EU CONSUMER HABITS REGARDING FISHERY AND AQUACULTURE PRODUCTS

ANNEX 4
COUNTRY FICHES

LAST UPDATE JANUARY 2017

WWW.EUMOFA.EU
<table>
<thead>
<tr>
<th>Country</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUSTRIA</td>
<td>3</td>
</tr>
<tr>
<td>BELGIUM</td>
<td>6</td>
</tr>
<tr>
<td>BULGARIA</td>
<td>9</td>
</tr>
<tr>
<td>CROATIA</td>
<td>12</td>
</tr>
<tr>
<td>CYPRUS</td>
<td>15</td>
</tr>
<tr>
<td>CZECH REPUBLIC</td>
<td>18</td>
</tr>
<tr>
<td>DENMARK</td>
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</tr>
<tr>
<td>ESTONIA</td>
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<td>FINLAND</td>
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<tr>
<td>FRANCE</td>
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<td>GERMANY</td>
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<td>GREECE</td>
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<td>HUNGARY</td>
<td>39</td>
</tr>
<tr>
<td>IRELAND</td>
<td>42</td>
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<tr>
<td>ITALY</td>
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<tr>
<td>LATVIA</td>
<td>48</td>
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<tr>
<td>LITHUANIA</td>
<td>51</td>
</tr>
<tr>
<td>LUXEMBOURG</td>
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</tr>
<tr>
<td>MALTA</td>
<td>57</td>
</tr>
<tr>
<td>NETHERLANDS</td>
<td>60</td>
</tr>
<tr>
<td>POLAND</td>
<td>63</td>
</tr>
<tr>
<td>PORTUGAL</td>
<td>66</td>
</tr>
<tr>
<td>ROMANIA</td>
<td>69</td>
</tr>
<tr>
<td>SLOVAKIA</td>
<td>72</td>
</tr>
<tr>
<td>SLOVENIA</td>
<td>75</td>
</tr>
<tr>
<td>SPAIN</td>
<td>78</td>
</tr>
<tr>
<td>SWEDEN</td>
<td>81</td>
</tr>
<tr>
<td>UNITED KINGDOM</td>
<td>84</td>
</tr>
</tbody>
</table>
**AUSTRIA**

**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Austria</th>
<th>13.4 kg/per capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>25.5 kg/per capita</td>
</tr>
</tbody>
</table>

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Austria</th>
<th>67 €</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>102 €</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

- Austria: $y = 99.982e^{0.0006x}$
- EU: $y = 99.982e^{-0.0004x}$

**Real per capita expenditure growth rate (2005-2014)**

- Austria: 2.69%
- EU: -0.04%

**Regular consumers by socio-demographic group**

**Age classes**

- 15-24: 67%
- 25-39: 70%
- 40-54: 75%
- 55+: 77%

**Socio-professional category**

- Self-employed: 62%
- Managers: 65%
- Other white collars: 54%
- Manual workers: 49%
- House persons: 48%
- Un-employed: 43%
- Retired: 67%
- Students: 39%

**Household composition**

- 1: 56%
- 2: 61%
- 3: 60%
- 4+: 46%

---

1 Regular consumers are those who eat fishery and aquaculture products at least once a month
**Consumer habits**

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preferences about types of products

Main products consumed

**Freshwater**

Freshwater fish

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors

**EXTERNAL FACTORS**

- **Frequency of promotional events**
  - Austria: 57%
  - EU: 56%

- **Product’s sustainability**
  - Austria: 23%
  - EU: 15%

**PERSONAL FACTORS**

- **Propensity to try new products**
  - Austria: 49%
  - EU: 60%

- **Convenience and ease of preparation**
  - Austria: 36%
  - EU: 32%

- **Hedonism**
  - Austria: 86%
  - EU: 68%

- **Fish as source of wellness and health**
  - Austria: 125%
  - EU: 123%

**Place of sale**

- **Fish farm, fisherman**
  - Austria: 17%
  - EU: 9%

- **Grocery store, super / hyper market**
  - Austria: 77%
  - EU: 76%

- **Fishmonger or specialist shop**
  - Austria: 32%
  - EU: 40%

- **Market**
  - Austria: 28%
  - EU: 25%

**Production method**

- **Wild fish**
  - Austria: 24%
  - EU: 34%

- **Farmed fish**
  - Austria: 13%
  - EU: 8%

- **No preference**
  - Austria: 63%
  - EU: 58%

**Species habitat**

- **Marine fish**
  - Austria: 15%
  - EU: 39%

- **Freshwater fish**
  - Austria: 18%
  - EU: 7%

- **No preference**
  - Austria: 67%
  - EU: 54%

**Presentation**

- **Loose**
  - Austria: 51%
  - EU: 68%

- **Pre-packed**
  - Austria: 77%
  - EU: 62%
Purchasing factors and use of information

Main NON consuming factors / NON purchasing factors

Taste, smell or appearance
High prices
Health concerns
No habit of buying fish
Environmental concerns
Vegetarian or vegan

49% 51% 49% 53% 46% 42% 6% 46% 24%

49% 51% 33% 37% 32% 44% 6% 33% 34%

Information sources

Public institutions
NGOs
Internet
Friends and family
Television, books and magazines
Store employee or fishmonger

13% 12% 27% 24% 35% 34% 43% 52%

74% 69%

Trust in information provided by seller

73% 71%

Trust in information required by law

82% 81%

Clarity of information

Consumer attitude to information on labels

Consumer interest in information on labels

Fresh, frozen, smoked, dried products

Tinned or prepared products

Voluntary information for all FAPs

Austria EU

Austria EU
Consumption and expenditure

Per capita consumption (2014)

Belgium: 24.8 kg per capita
EU: 25.5 kg per capita

Real per capita expenditure growth rate (2005-2014)

Belgium: -0.75%
EU: -0.04%

Per capita nominal expenditure (2014)

Belgium: 129 €
EU: 102 €

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

Age classes

15-24: 69% Belgium, 67% EU
25-39: 73% Belgium, 70% EU
40-54: 84% Belgium, 75% EU
55+: 81% Belgium, 77% EU

Socio-professional category

Self-employed: 78% Belgium, 76% EU
Managers: 86% Belgium, 81% EU
Other white collars: 74% Belgium, 71% EU
Manual workers: 82% Belgium, 73% EU
House persons: 70% Belgium, 73% EU
Un-employed: 72% Belgium, 70% EU
Retired: 75% Belgium, 76% EU
Students: 68% Belgium, 67% EU

Household composition

1: 73% Belgium, 71% EU
2: 75% Belgium, 78% EU
3: 75% Belgium, 78% EU
4+: 72% Belgium, 80% EU

Regular consumers are those who eat fishery and aquaculture products at least once a month.
### Consumer habits

#### Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

#### Preference about types of products

#### Main products consumed

<table>
<thead>
<tr>
<th></th>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cod</td>
<td>Salmon</td>
</tr>
<tr>
<td></td>
<td>Mussels</td>
<td></td>
</tr>
</tbody>
</table>

#### Preference about

#### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

#### Main consumption/ purchasing factors

<table>
<thead>
<tr>
<th></th>
<th>Belgian</th>
<th>EU</th>
<th>Belgian</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place of sale</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fish farm, fisherman</td>
<td></td>
<td></td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Grocery store, super / hyper market</td>
<td></td>
<td></td>
<td>79%</td>
<td>74%</td>
</tr>
<tr>
<td>Fishmonger or specialist shop</td>
<td>40%</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market</td>
<td>32%</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Place of sale

- Fish farm, fisherman
- Grocery store, super / hyper market
- Fishmonger or specialist shop
- Market

#### Personal factors

- Fish as source of wellness and
- Hedonism
- Convenience and
- Propensity to try

#### External factors

- High prices
- Retail diversification
- Frequency of promotional events
- Product's sustainability

#### Presentation

<table>
<thead>
<tr>
<th></th>
<th>Belgium</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

#### Production method

<table>
<thead>
<tr>
<th></th>
<th>Belgium</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Species habitat

<table>
<thead>
<tr>
<th></th>
<th>Belgium</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

#### Types of FAPs

- Fresh
- Frozen
- Smoked
- Tinned
- Breaded
**Purchasing factors and use of information**

### Main non-consumption/Non-purchasing factors
- Taste, smell or appearance: 63% Belgium, 69% EU
- High prices: 20% Belgium, 24% EU
- Health concerns: 13% Belgium, 17% EU
- No habit of buying fish: 37% Belgium, 45% EU
- Environmental concerns: 22% Belgium, 27% EU
- Vegetarian or vegan: 3% Belgium, 5% EU

### Factors influencing consumer demand and purchasing behaviour
- Price, price/quality ratio: 55% Belgium, 61% EU
- Appearance: 55% Belgium, 41% EU
- Origin: 47% Belgium, 41% EU
- Brand or quality labels: 28% Belgium, 24% EU

### Information sources
- Public institutions: 13% Belgium, 4% EU
- NGOs: 11% Belgium, 5% EU
- Internet: 32% Belgium, 5% EU
- Friends and family: 24% Belgium, 21% EU
- Television, books and magazines: 38% Belgium, 19% EU
- Store employee or fishmonger: 52% Belgium, 52% EU

### Consumer attitude to information on labels
- Clarity of information: 63% Belgium, 69% EU
- Trust in information provided by seller: 71% Belgium, 71% EU
- Trust in information required by law: 83% Belgium, 81% EU

### Consumer interest in information on labels
- Fresh, frozen, smoked, dried products: 100%
  - Product name and species name
  - "use by" or "best before" date
  - Whether previously frozen
  - Area of catch or production

- Tinned or prepared products: 80%
  - Species contained
  - Processing plant location

- Voluntary information for all FAPs: 80%
  - Date of catch or production
  - Port in which the product was landed
  - Country of the ship that caught the product
  - Information on the fisherman/fish farmer
  - Environmental information
  - Social information
  - Ethical information
### Consumption and expenditure

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Value (kg/per capita)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulgaria</td>
<td>5.9</td>
</tr>
<tr>
<td>EU</td>
<td>25.5</td>
</tr>
</tbody>
</table>

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Value (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulgaria</td>
<td>17</td>
</tr>
<tr>
<td>EU</td>
<td>102</td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

- **Bulgaria**: 10.70% (EU: -0.04%)

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### Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

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### Regular consumers by socio-demographic group

#### Age classes

- **15-24**: 40% (EU: 67%)
- **25-39**: 60% (EU: 70%)
- **40-54**: 64% (EU: 75%)
- **55+**: 51% (EU: 77%)

#### Socio-professional category

- **Self-employed**: 65% (EU: 76%)
- **Managers**: 72% (EU: 81%)
- **Other white collars**: 67% (EU: 71%)
- **Manual workers**: 68% (EU: 72%)
- **House persons**: 55% (EU: 73%)
- **Un-employed**: 51% (EU: 70%)
- **Retired**: 50% (EU: 61%)
- **Students**: 50% (EU: 61%)

#### Household composition

- **1**: 53% (EU: 71%)
- **2**: 60% (EU: 75%)
- **3**: 66% (EU: 75%)
- **4+**: 64% (EU: 72%)

---

3 Regular consumers are those who eat fishery and aquaculture products at least once a month.
### Consumer habits

#### Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

#### Preference about types of products

#### Main products consumed

<table>
<thead>
<tr>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>mackerel</td>
<td>carp</td>
</tr>
<tr>
<td>sprat</td>
<td>rainbow trout</td>
</tr>
<tr>
<td>hake</td>
<td>pike-perch</td>
</tr>
</tbody>
</table>

#### Preference about

#### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

#### Main consumption/ purchasing factors

**PERSONAL FACTORS**
- Fish as source of wellness and health
- Hedonism
- Convenience and ease of preparation
- Propensity to try new products

**EXTERNAL FACTORS**
- High prices
- Retail diversification
- Frequency of promotional events
- Product's sustainability
Purchasing factors and use of information

Price, price/quality ratio
Appearance
Origin (regional/national)
Brand or quality labels

Main NFM consumption/ NFM purchasing factors

Taste, smell or appearance
High prices
Health concerns
No habit of buying fish
Environmental concerns
Vegetarian or vegan

Information sources

Public institutions
NGOs
Internet
Friends and family
Television, books and magazines

Trust in information provided by seller

Clarity of information

Trust in information required by law

Consumer attitude to information on labels

70% 69%
77% 71%
78% 81%

Consumer interest in information on labels

Fresh, frozen, smoked, dried products
Tinned or prepared products
Voluntary information for all FAPs

Date of catch or production
Port in which the product was landed
Country of the ship that caught the product
Environmental information
Social information
Ethical information
CROATIA

Consumption and expenditure

Per capita consumption (2014)

Croatia
18.4 kg/per capita

EU
25.5 kg/per capita

Real per capita expenditure growth rate (2005-2014)

Per capita nominal expenditure (2014)

Croatia
47 €

EU
102 €

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

4 Regular consumers are those who eat fishery and aquaculture products at least once a month

Household composition
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Marine

- sardine
- hake

Preparation method

<table>
<thead>
<tr>
<th></th>
<th>Croatia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production method</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild fish</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Farmed fish</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>No preference</td>
<td>54%</td>
<td>58%</td>
</tr>
</tbody>
</table>

Species habitat

<table>
<thead>
<tr>
<th></th>
<th>Croatia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Species habitat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marine fish</td>
<td>50%</td>
<td>39%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>No preference</td>
<td>36%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Presentation

<table>
<thead>
<tr>
<th></th>
<th>Croatia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loose</td>
<td>69%</td>
<td>68%</td>
</tr>
<tr>
<td>Pre-packed</td>
<td>66%</td>
<td>62%</td>
</tr>
</tbody>
</table>

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th></th>
<th>Often</th>
<th>Δ(MS-EU)</th>
<th>Never</th>
<th>Δ(MS-EU)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>15%</td>
<td>7%</td>
<td>1%</td>
<td>-1%</td>
</tr>
<tr>
<td>Frozen</td>
<td>12%</td>
<td>5%</td>
<td>1%</td>
<td>-1%</td>
</tr>
<tr>
<td>Smoked</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Tinned</td>
<td>3%</td>
<td>2%</td>
<td>-7%</td>
<td>-7%</td>
</tr>
<tr>
<td>Breaded</td>
<td>20%</td>
<td>0%</td>
<td>14%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Main consumption/purchasing factors

<table>
<thead>
<tr>
<th></th>
<th>Croatia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place of sale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fish farm, fisherman</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Grocery store, super / hyper market</td>
<td>63%</td>
<td>74%</td>
</tr>
<tr>
<td>Fishmonger or specialist shop</td>
<td>51%</td>
<td>40%</td>
</tr>
<tr>
<td>Market</td>
<td>40%</td>
<td>25%</td>
</tr>
</tbody>
</table>

PERSONAL FACTORS

- Fish as source of wellness and health: 121% vs 123%
- Hedonism: 68% vs 60%
- Convenience and ease of preparation: 67% vs 32%
- Propensity to try new products: 69% vs 65%

EXTERNAL FACTORS

- High prices: 8% vs 68%
- Retail diversification: 60% vs 51%
- Frequency of promotional events: 36% vs 50%
- Product’s sustainability: 11% vs 15%
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behaviour:

- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Information sources:

- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Consumer attitude to information on labels:

- Clarity of information
- Trust in information provided by seller
- Trust in information required by law

Consumer interest in information on labels:

- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs
**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th></th>
<th>Cyprus</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumption</td>
<td>25,0</td>
<td>25,5</td>
</tr>
<tr>
<td>kg/per capita</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

- Cyprus: -4.30%
- EU: -0.04%

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th></th>
<th>Cyprus</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditure</td>
<td>100 €</td>
<td>102 €</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

\[ y = 102.43e^{0.0023x} \]

**Regular consumers\(^5\) by socio-demographic group**

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other whitecollars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>77%</td>
<td>81%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>70%</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>25-39</td>
<td>77%</td>
<td>81%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>70%</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>40-54</td>
<td>77%</td>
<td>81%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>70%</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>55+</td>
<td>77%</td>
<td>81%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>70%</td>
<td>76%</td>
<td>77%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

- Cyprus
- EU

**Household composition**

- 1: 78% 71%
- 2: 65% 70%
- 3: 75% 70%
- 4+: 86% 72%

\(^5\) Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behavior:

- Price, price/quality ratio (68% in Croatia, 65% in EU)
- Appearance (73% in Croatia, 59% in EU)
- Origin (regional/national) (47% in Croatia, 42% in EU)
- Brand or quality labels (11% in Croatia, 24% in EU)

Information sources:

- Public institutions (4% in Croatia, 6% in EU)
- NGOs (5% in Croatia, 3% in EU)
- Internet (24% in Croatia, 20% in EU)
- Friends and family (21% in Croatia, 29% in EU)
- Television, books and magazines (20% in Croatia, 29% in EU)
- Store employee or fishmonger (55% in Croatia, 30% in EU)

Clarity of information:

- 76% in Croatia, 69% in EU
- Trust in information provided by seller:
  - 63% in Croatia, 71% in EU
- Trust in information required by law:
  - 82% in Croatia, 81% in EU

Consumer interest in information on labels:

- 90% for fresh, frozen, smoked, dried products
- 80% for tinned or prepared products
- 70% for voluntary information for all FAPs

Main NON consumption/ NON purchasing factors:

- Taste, smell or appearance
- High prices
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

Main factors influencing consumer demand and purchasing behavior:

- 70% for taste, smell or appearance
- 60% for high prices
- 55% for health concerns
- 60% for no habit of buying fish
- 55% for environmental concerns
- 55% for vegetarian or vegan

Consumer attitude to information on labels:

- Clarity of information:
  - 76% in Croatia, 69% in EU
- Trust in information provided by seller:
  - 63% in Croatia, 71% in EU
- Trust in information required by law:
  - 82% in Croatia, 81% in EU

Information on the fisherman/fish farmer:

- Date of catch or production:
  - 100% in Cyprus, 71% in EU
- Port in which the product was landed:
  - 50% in Cyprus, 71% in EU
- Environmental information:
  - Social information
  - Ethical information

Voluntary information for all FAPs:

- Date of catch or production:
  - 100% in Cyprus, 71% in EU
- Port in which the product was landed:
  - 50% in Cyprus, 71% in EU
- Environmental information:
  - Social information
  - Ethical information
**CZECH REPUBLIC**

**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>7.5</td>
</tr>
<tr>
<td>EU</td>
<td>25.5</td>
</tr>
</tbody>
</table>

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Expenditure (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>27</td>
</tr>
<tr>
<td>EU</td>
<td>102</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

**Regular consumers** by socio-demographic group

**Age classes**

<table>
<thead>
<tr>
<th>Age class</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>47%</td>
<td>67%</td>
</tr>
<tr>
<td>25-39</td>
<td>51%</td>
<td>70%</td>
</tr>
<tr>
<td>40-54</td>
<td>56%</td>
<td>75%</td>
</tr>
<tr>
<td>55+</td>
<td>61%</td>
<td>77%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

<table>
<thead>
<tr>
<th>Category</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>61%</td>
<td>76%</td>
</tr>
<tr>
<td>Managers</td>
<td>62%</td>
<td>81%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>63%</td>
<td>71%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>47%</td>
<td>71%</td>
</tr>
<tr>
<td>House persons</td>
<td>59%</td>
<td>72%</td>
</tr>
<tr>
<td>Un-employed</td>
<td>51%</td>
<td>70%</td>
</tr>
<tr>
<td>Retired</td>
<td>62%</td>
<td>76%</td>
</tr>
<tr>
<td>Students</td>
<td>47%</td>
<td>67%</td>
</tr>
</tbody>
</table>

**Household composition**

<table>
<thead>
<tr>
<th>Household size</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>58%</td>
<td>71%</td>
</tr>
<tr>
<td>2</td>
<td>58%</td>
<td>75%</td>
</tr>
<tr>
<td>3</td>
<td>51%</td>
<td>75%</td>
</tr>
<tr>
<td>4+</td>
<td>53%</td>
<td>72%</td>
</tr>
</tbody>
</table>

---

6 Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

**Regular consumers vs non-consumers & Regular purchasers vs non-purchasers**

**Preference about types of products**

**Main products consumed**

<table>
<thead>
<tr>
<th></th>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>bream</td>
<td></td>
<td>carp</td>
</tr>
<tr>
<td>trout</td>
<td></td>
<td>pike</td>
</tr>
<tr>
<td>bream</td>
<td></td>
<td>pike</td>
</tr>
</tbody>
</table>

**Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)**

- **Production method**
  - **Czech Republic**
    - Fish farm, fisherman: 19% (4% of EU average)
    - Grocery store, super / hyper market: 74% (73% of EU average)
    - Fishmonger or specialist shop: 39% (40% of EU average)
    - Market: 25% (25% of EU average)

- **Preference**
  - **Czech Republic**
    - Fish farm, fisherman: 44% (6% of EU average)
    - Grocery store, super / hyper market: 70% (70% of EU average)
    - Fishmonger or specialist shop: 68% (68% of EU average)
    - Market: 62% (62% of EU average)

**Main consumption/ purchasing factors**

- **PERSONAL FACTORS**
  - Fish as source of wellness and health: 140% (119% of EU average)
  - Hedonism: 123% (123% of EU average)
  - Convenience and ease of preparation: 68% (68% of EU average)

- **EXTERNAL FACTORS**
  - High prices: 68% (68% of EU average)
  - Retail diversification: 51% (51% of EU average)
  - Frequency of promotional events: 56% (56% of EU average)
  - Propensity to try new products: 59% (59% of EU average)
  - Product's sustainability: 60% (60% of EU average)
### Purchasing factors and use of information

#### Factors influencing consumer demand and purchasing behaviour

<table>
<thead>
<tr>
<th>Factor</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price, price/quality ratio</td>
<td>72%</td>
<td>55%</td>
</tr>
<tr>
<td>Appearance</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Origin (regional/national)</td>
<td>68%</td>
<td>55%</td>
</tr>
<tr>
<td>Brand or quality labels</td>
<td>34%</td>
<td>34%</td>
</tr>
</tbody>
</table>

#### Main NON consumers/non-NON purchasing factors

<table>
<thead>
<tr>
<th>Factor</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste, smell or appearance</td>
<td>62%</td>
<td>55%</td>
</tr>
<tr>
<td>High prices</td>
<td>55%</td>
<td>40%</td>
</tr>
<tr>
<td>Health concerns</td>
<td>53%</td>
<td>31%</td>
</tr>
<tr>
<td>No habit of buying fish</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Environmental concerns</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>Vegetarian or vegan</td>
<td>29%</td>
<td>24%</td>
</tr>
</tbody>
</table>

#### Information sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public institutions</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>NGOs</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Internet</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>Friends and family</td>
<td>24%</td>
<td>29%</td>
</tr>
<tr>
<td>Television, books and magazines</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Store employee or fishmonger</td>
<td>50%</td>
<td>52%</td>
</tr>
</tbody>
</table>

#### Consumer interest in information on labels

<table>
<thead>
<tr>
<th>Product type</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh, frozen, smoked, dried products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tinned or prepared products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voluntary information for all FAPs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Consumer attitude to information on labels

<table>
<thead>
<tr>
<th>Clarity of information</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust in information provided by seller</td>
<td>70%</td>
<td>69%</td>
</tr>
<tr>
<td>Trust in information required by law</td>
<td>73%</td>
<td>71%</td>
</tr>
</tbody>
</table>

#### Information on the fisherman/fish farmer

<table>
<thead>
<tr>
<th>Information on the fisherman/fish farmer</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin of processed product</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Species contained</td>
<td>80%</td>
<td>60%</td>
</tr>
<tr>
<td>Processing plant location</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Wild or farmed product</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>“use by” or “best before” date</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country of the ship that caught the product</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information on the ship</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

#### Ethical information

<table>
<thead>
<tr>
<th>Social information</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Ethical information</th>
<th>Czech Republic</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>50%</td>
<td></td>
</tr>
</tbody>
</table>
Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Denmark</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.1 kg/per capita</td>
<td>25.5 kg/per capita</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

<table>
<thead>
<tr>
<th>Denmark</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.65%</td>
<td>-0.04%</td>
</tr>
</tbody>
</table>

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Denmark</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>91 €</td>
<td>102 €</td>
</tr>
</tbody>
</table>

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Denmark

Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>76%</td>
<td>91%</td>
<td>71%</td>
<td>72%</td>
<td>73%</td>
<td>70%</td>
<td>76%</td>
<td>87%</td>
</tr>
<tr>
<td>25-39</td>
<td>81%</td>
<td>91%</td>
<td>72%</td>
<td>91%</td>
<td>73%</td>
<td>70%</td>
<td>88%</td>
<td>85%</td>
</tr>
<tr>
<td>40-54</td>
<td>88%</td>
<td>89%</td>
<td>72%</td>
<td>100%</td>
<td>83%</td>
<td>70%</td>
<td>88%</td>
<td>85%</td>
</tr>
<tr>
<td>55+</td>
<td>76%</td>
<td>91%</td>
<td>83%</td>
<td>91%</td>
<td>73%</td>
<td>82%</td>
<td>76%</td>
<td>85%</td>
</tr>
</tbody>
</table>

Household composition

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>75%</td>
<td>90%</td>
<td>85%</td>
</tr>
</tbody>
</table>

Regular consumers are those who eat fishery and aquaculture products at least once a month
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors

EXTERNAL FACTORS

PERSONAL FACTORS

High prices
Retail diversification
Frequency of promotional events
Product's sustainability

Fishing as source of wellness and health
Hedonism
Convenience and ease of preparation
Propensity to try new products

Denmark
EU

Denmark
EU

Denmark
EU

Denmark
EU

Denmark
EU

Denmark
EU
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behaviour:
- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Information sources:
- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Consumer attitude to information on labels:
- Clarity of information
- Trust in information provided by seller
- Trust in information required by law

Consumer interest in information on labels:
- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs

Voluntary information for all FAPs:
- Date of catch or production
- Information on the fisherman/fish farmer
- Country of the ship that caught the product
- Social information
- Ethical information

Information on the fisherman/fish farmer:
- Species contained
- Origin of processed product
- Wild or farmed product
- Fishing gear used
- Area of catch or production
- Whether previously frozen
- Processing plant location
- Wild or farmed product
- Species contained
- Date of catch or production

Trust in information required by law:
- Denmark: 87%
- EU: 81%

Clarity of information:
- Denmark: 80%
- EU: 69%

Trust in information provided by seller:
- Denmark: 75%
- EU: 71%
**ESTONIA**

**Consumption and expenditure**

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Socio-professional category</th>
<th>Estonia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>82%</td>
<td>75%</td>
</tr>
<tr>
<td>Managers</td>
<td>83%</td>
<td>96%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>71%</td>
<td>89%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>72%</td>
<td>85%</td>
</tr>
<tr>
<td>House persons</td>
<td>73%</td>
<td>95%</td>
</tr>
<tr>
<td>Un-employed</td>
<td>72%</td>
<td>88%</td>
</tr>
<tr>
<td>Retired</td>
<td>72%</td>
<td>87%</td>
</tr>
<tr>
<td>Students</td>
<td>72%</td>
<td>87%</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

- **Estonia**: 6.46%
- **EU**: -0.04%

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Socio-professional category</th>
<th>Estonia</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>82%</td>
<td>75%</td>
</tr>
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<td>96%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>71%</td>
<td>89%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>72%</td>
<td>85%</td>
</tr>
<tr>
<td>House persons</td>
<td>73%</td>
<td>95%</td>
</tr>
<tr>
<td>Un-employed</td>
<td>72%</td>
<td>88%</td>
</tr>
<tr>
<td>Retired</td>
<td>72%</td>
<td>87%</td>
</tr>
<tr>
<td>Students</td>
<td>72%</td>
<td>87%</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

Y = 100,56e^0.04x

**Regular consumers** by socio-demographic group

- **Regular consumers** are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Marine

Baltic herring

sprat

Freshwater

tout

Fresh salmon

Place of sale

Fish farm, fisherman

17% 9%

Grocery store, super / hyper market

84% 74%

Fishmonger or specialist shop

33% 40%

Market

34% 25%

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/ purchasing factors

PERSONAL FACTORS

Fish as source of wellness and health

106% 123%

Hedonism

80% 68%

Convenience and ease of preparation

40% 22%

Propensity to try new products

66% 60%

EXTERNAL FACTORS

High prices

79% 68%

Retail diversification

64% 51%

Frequency of promotional events

48% 56%

Product’s sustainability

5% 15%
### Purchasing factors and use of information

#### Factors influencing consumer demand and purchasing behaviour

- **Price, price/quality ratio**: 71% (Estonia), 55% (EU)
- **Appearance**: 83% (Estonia), 58% (EU)
- **Origin (regional/national)**: 42% (Estonia), 21% (EU)
- **Brand or quality labels**: 24% (Estonia), 24% (EU)

#### Information sources

- **Public institutions**: 4% (Estonia), 4% (EU)
- **NGOs**: 5% (Estonia), 5% (EU)
- **Internet**: 32% (Estonia), 24% (EU)
- **Friends and family**: 44% (Estonia), 28% (EU)
- **Television, books and magazines**: 27% (Estonia), 29% (EU)
- **Store employee or fishmonger**: 48% (Estonia), 52% (EU)

#### Consumer attitude to information on labels

- **Clarity of information**: 65% (Estonia), 69% (EU)
- **Trust in information provided by seller**: 64% (Estonia), 71% (EU)
- **Trust in information required by law**: 66% (Estonia), 81% (EU)

#### Consumer interest in information on labels

- **Fresh, frozen, smoked, dried products**:
  - **Product name and species name**: 100% (Estonia), 100% (EU)
  - **"use by" or "best before" date**: 60% (Estonia), 60% (EU)
  - **Whether previously frozen**: 40% (Estonia), 40% (EU)
  - **Area of catch or production**: 60% (Estonia), 60% (EU)
  - **Fishing gear used**: 50% (Estonia), 50% (EU)
  - **Wild or farmed product**: 40% (Estonia), 40% (EU)

- **Tinned or prepared products**:
  - **Species contained**: 80% (Estonia), 50% (EU)
  - **Processing plant location**: 60% (Estonia), 40% (EU)
  - **Origin of processed product**: 40% (Estonia), 20% (EU)
  - **Fishing gear used**: 60% (Estonia), 40% (EU)
  - **Wild or farmed product**: 40% (Estonia), 40% (EU)

- **Voluntary information for all FAPs**:
  - **Date of catch or production**: 100% (Estonia), 100% (EU)
  - **Port in which the product was landed**: 50% (Estonia), 50% (EU)
  - **Country of the ship that caught the product**: 20% (Estonia), 20% (EU)
  - **Environmental information**: 50% (Estonia), 50% (EU)
  - **Social information**: 30% (Estonia), 30% (EU)
  - **Ethical information**: 10% (Estonia), 10% (EU)
**FINLAND**

**Consumption and expenditure**

**Per capita consumption (2014)**

- **Finland**: 23.9 kg/per capita
- **EU**: 25.5 kg/per capita

**Per capita nominal expenditure (2014)**

- **Finland**: 103 €
- **EU**: 102 €

**Real per capita expenditure growth rate (2005-2014)**

- Finland: 2.77%
- EU: -0.04%

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

- Equation: \( y = 106.53e^{0.005x} \)

**Regular consumers\(^9\) by socio-demographic group**

- **Age classes**
  - 15-24: 26% (Finland), 67% (EU)
  - 25-39: 27% (Finland), 70% (EU)
  - 40-54: 28% (Finland), 75% (EU)
  - 55+: 26% (Finland), 77% (EU)

- **Socio-professional category**
  - Self- employed: 35% (Finland), 76% (EU)
  - Managers: 26% (Finland), 81% (EU)
  - Other white collars: 34% (Finland), 71% (EU)
  - Manual workers: 23% (Finland), 72% (EU)
  - House persons: 26% (Finland), 73% (EU)
  - Un-employed: 28% (Finland), 70% (EU)
  - Retired: 25% (Finland), 76% (EU)
  - Students: 25% (Finland), 67% (EU)

- **Household composition**
  - 1: 23% (Finland), 71% (EU)
  - 2: 29% (Finland), 75% (EU)
  - 3: 29% (Finland), 75% (EU)
  - 4+: 24% (Finland), 72% (EU)

---

\(^9\) Regular consumers are those who eat fishery and aquaculture products at least once a month
### Consumer habits

#### Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

#### Preference about types of products

- **Preserved, processed, canned**
- **Smoked, Salted, dried**
- **Breaded**
- **Fresh**
- **Frozen**

#### Preference about place of sale

- **Fish farm, fisherman**
- **Grocery store, super / hyper market**
- **Fishmonger or specialist shop**
- **Market**

#### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th></th>
<th>Fresh</th>
<th>Frozen</th>
<th>Smoked</th>
<th>Tinned</th>
<th>Breaded</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Often</strong></td>
<td>47%</td>
<td>25%</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Δ(MS-EU)</strong></td>
<td>-9%</td>
<td>13%</td>
<td>-3%</td>
<td>-12%</td>
<td>-12%</td>
</tr>
<tr>
<td><strong>Never</strong></td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Δ(MS-EU)</strong></td>
<td>-13%</td>
<td>-13%</td>
<td>-13%</td>
<td>-13%</td>
<td>-13%</td>
</tr>
</tbody>
</table>

#### Main consumption/ purchasing factors

<table>
<thead>
<tr>
<th></th>
<th>Finland</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINLAND</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fish as source of wellness and health</td>
<td>46%</td>
<td>63%</td>
</tr>
<tr>
<td>Hedonism</td>
<td>80%</td>
<td>79%</td>
</tr>
<tr>
<td>Convenience and ease of preparation</td>
<td>66%</td>
<td>67%</td>
</tr>
<tr>
<td>Propensity to try new products</td>
<td>59%</td>
<td>60%</td>
</tr>
</tbody>
</table>

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fish as source of wellness and health</td>
<td>44%</td>
<td>68%</td>
</tr>
<tr>
<td>Hedonism</td>
<td>64%</td>
<td>76%</td>
</tr>
<tr>
<td>Convenience and ease of preparation</td>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>Propensity to try new products</td>
<td>60%</td>
<td>60%</td>
</tr>
</tbody>
</table>

#### PERSONAL FACTORS

<table>
<thead>
<tr>
<th></th>
<th>Finland</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINLAND</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High prices</td>
<td>62%</td>
<td>68%</td>
</tr>
<tr>
<td>Retail diversification</td>
<td>45%</td>
<td>54%</td>
</tr>
<tr>
<td>Frequency of promotional events</td>
<td>59%</td>
<td>56%</td>
</tr>
<tr>
<td>Product's sustainability</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High prices</td>
<td>66%</td>
<td>74%</td>
</tr>
<tr>
<td>Retail diversification</td>
<td>51%</td>
<td>60%</td>
</tr>
<tr>
<td>Frequency of promotional events</td>
<td>56%</td>
<td>60%</td>
</tr>
<tr>
<td>Product's sustainability</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Purchasing factors and use of information

Information sources

Consumer attitude to information on labels

Clarity of information

Trust in information provided by seller

Trust in information required by law

Consumer interest in information on labels

Voluntary information for all FAPs
### FRANCE

#### Consumption and expenditure

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th></th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>34.4 kg/per capita</td>
<td>25.5 kg/per capita</td>
<td></td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

- **France**: -3.60%
- **EU**: -0.04%

**Per capita nominal expenditure (2014)**

- **France**: 127 €
- **EU**: 102 €

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

- Expon. (p.c. consumption): $y = 99.511e^{-0.002x}$

#### Regular consumers by socio-demographic group

**Age classes**

<table>
<thead>
<tr>
<th></th>
<th>15-24</th>
<th>25-39</th>
<th>40-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>79%</td>
<td>71%</td>
<td>86%</td>
<td>85%</td>
</tr>
<tr>
<td>EU</td>
<td>67%</td>
<td>70%</td>
<td>75%</td>
<td>77%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

- Self-employed: France 81%, EU 76%
- Managers: France 83%, EU 82%
- Other white collars: France 79%, EU 71%
- Manual workers: France 73%, EU 72%
- House persons: France 80%, EU 73%
- Un-employed: France 71%, EU 80%
- Retired: France 70%, EU 85%
- Students: France 67%, EU 87%

**Household composition**

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>self-employed</td>
<td>71%</td>
<td>75%</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>managers</td>
<td>88%</td>
<td>82%</td>
<td>82%</td>
<td>85%</td>
</tr>
<tr>
<td>other white collars</td>
<td>79%</td>
<td>71%</td>
<td>71%</td>
<td>71%</td>
</tr>
<tr>
<td>manual workers</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>house persons</td>
<td>80%</td>
<td>73%</td>
<td>80%</td>
<td>85%</td>
</tr>
<tr>
<td>unemployed</td>
<td>71%</td>
<td>80%</td>
<td>71%</td>
<td>85%</td>
</tr>
<tr>
<td>retired</td>
<td>70%</td>
<td>73%</td>
<td>70%</td>
<td>87%</td>
</tr>
<tr>
<td>students</td>
<td>67%</td>
<td>87%</td>
<td>67%</td>
<td>87%</td>
</tr>
</tbody>
</table>

---

10 Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

**Main consumption/purchasing factors**

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

France

EU

### Main products consumed

<table>
<thead>
<tr>
<th></th>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shellfish, other fresh</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>Salmon</td>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>

### Preference about types of products

<table>
<thead>
<tr>
<th></th>
<th>Fresh</th>
<th>Breaded</th>
<th>Frozen</th>
<th>Smoked, Salted, dried</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>46%</td>
<td>31%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>EU</td>
<td>50%</td>
<td>34%</td>
<td>14%</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Preference about

<table>
<thead>
<tr>
<th>Production method</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild fish</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Farmed fish</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>No preference</td>
<td>44%</td>
<td>58%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Species handling</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine fish</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>No preference</td>
<td>45%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Presentation</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loose</td>
<td>71%</td>
<td>55%</td>
</tr>
<tr>
<td>Pre-packed</td>
<td>29%</td>
<td>45%</td>
</tr>
</tbody>
</table>

### Place of sale

<table>
<thead>
<tr>
<th>Fishing method</th>
<th>Place of sale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish farm, fisherman</td>
<td>Grocery store, super / hyper market</td>
</tr>
<tr>
<td>Fishmonger or specialist shop</td>
<td></td>
</tr>
<tr>
<td>Market</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Main consumption/purchasing factors</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish as source of wellness and health</td>
<td>38%</td>
<td>22%</td>
</tr>
<tr>
<td>Hedonism</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Convenience and ease of preparation</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Propensity to try new products</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th></th>
<th>Often</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>38%</td>
<td>-5%</td>
</tr>
<tr>
<td>Frozen</td>
<td>22%</td>
<td>3%</td>
</tr>
<tr>
<td>Smoked</td>
<td>18%</td>
<td>3%</td>
</tr>
<tr>
<td>Tinned</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Breaded</td>
<td>13%</td>
<td>-3%</td>
</tr>
</tbody>
</table>
Purchasing factors and use of information

Information sources

<table>
<thead>
<tr>
<th>Source</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public institutions</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>NGOs</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Internet</td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td>Friends and family</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Television, books and magazines</td>
<td>39%</td>
<td>40%</td>
</tr>
<tr>
<td>Store employee or fishmonger</td>
<td>60%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Consumer attitude to information on labels

<table>
<thead>
<tr>
<th>Clarity of information</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust in information provided by seller</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>Trust in information required by law</td>
<td>66%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Consumer interest in information on labels

<table>
<thead>
<tr>
<th>Fresh, frozen, smoked, dried products</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product name and species name</td>
<td>100%</td>
<td>90%</td>
</tr>
<tr>
<td>&quot;Use by&quot; or &quot;best before&quot; date</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Wild or farmed product</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Area of catch or production</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Whether previously frozen</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Fishing gear used</td>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tinned or prepared products</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Species contained</td>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>Origin of processed product</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Processing plant location</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Fishing gear used</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Wild or farmed product</td>
<td>40%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Voluntary information for all FAPs</th>
<th>France</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of catch or production</td>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>Port in which the product was landed</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Environmental information</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Country of the ship that caught the product</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Social information</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Ethical information</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>
**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Germany</th>
<th>13.3 kg/per capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>25.5 kg/per capita</td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

<table>
<thead>
<tr>
<th>Germany</th>
<th>0.49%</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>-0.04%</td>
</tr>
</tbody>
</table>

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Germany</th>
<th>58 €</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>102 €</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

\[ y = 107.64e^{0.011x} \]

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**Regular consumers** by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>68%</td>
<td>48%</td>
<td>66%</td>
<td>74%</td>
<td>64%</td>
<td>66%</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>25-39</td>
<td>66%</td>
<td>48%</td>
<td>66%</td>
<td>74%</td>
<td>64%</td>
<td>66%</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>40-54</td>
<td>49%</td>
<td>48%</td>
<td>66%</td>
<td>74%</td>
<td>64%</td>
<td>66%</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>55+</td>
<td>63%</td>
<td>48%</td>
<td>66%</td>
<td>74%</td>
<td>64%</td>
<td>66%</td>
<td>58%</td>
<td>63%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

- Self-employed: 76% Germany, 75% EU
- Managers: 81% Germany, 71% EU
- Other white collars: 60% Germany, 71% EU
- Manual workers: 74% Germany, 73% EU
- House persons: 75% Germany, 70% EU
- Un-employed: 76% Germany, 76% EU
- Retired: 76% Germany, 76% EU
- Students: 67% Germany, 67% EU

**Household composition**

- 1: 68% Germany, 71% EU
- 2: 70% Germany, 75% EU
- 3: 67% Germany, 75% EU
- 4+: 69% Germany, 72% EU

---

11 Regular consumers are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/ purchasing factors
Purchasing factors and use of information

Information sources

- Public institutions: 4% in Germany, 4% in EU
- NGOs: 8% in Germany, 5% in EU
- Internet: 32% in Germany, 5% in EU
- Friends and family: 23% in Germany, 28% in EU
- Television, books and magazines: 34% in Germany, 29% in EU
- Store employee or fishmonger: 44% in Germany, 52% in EU

Consumer attitude to information on labels

- Clarity of information: 63% in Germany, 69% in EU
- Trust in information provided by seller: 62% in Germany, 71% in EU
- Trust in information required by law: 78% in Germany, 81% in EU

Consumer interest in information on labels

- Fresh, frozen, smoked, dried products:
  - Species name contained: 80% in Germany, 80% in EU
  - "use by" or "best before" date: 45% in Germany, 12% in EU
  - Whether previously frozen: 15% in Germany, 14% in EU
  - Area of catch or production: 24% in Germany, 10% in EU
  - Wild or farmed product: 39% in Germany, 15% in EU

- Tinned or prepared products:
  - Species contained: 80% in Germany, 60% in EU
  - Processing plant location: 60% in Germany, 30% in EU
  - Fishing gear used: 24% in Germany, 16% in EU
  - Wild or farmed product: 42% in Germany, 10% in EU

- Voluntary information for all FAPs:
  - Date of catch or production: 80% in Germany, 40% in EU
  - Port in which the product was landed: 34% in Germany, 6% in EU
  - Country of the ship that caught the product: 14% in Germany, 6% in EU
  - Environmental information: 32% in Germany, 10% in EU
  - Social information: 4% in Germany, 8% in EU
  - Ethical information: 4% in Germany, 4% in EU

Main NQA consumption/NQA purchasing factors

- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Factors influencing consumer demand and purchasing behaviour

- Germany
- EU

Main NQA consumption/NQA purchasing factors

- Taste, smell or appearance
- High prices
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

Consumer interest in information on labels

- Germany
- EU

Voluntary information for all FAPs

- Date of catch or production
- Port in which the product was landed
- Country of the ship that caught the product
- Environmental information
- Social information
- Ethical information
### Consumption and expenditure

**Per capita consumption (2014)**

- **Greece**: 17.3 kg/per capita
- **EU**: 25.5 kg/per capita

**Per capita nominal expenditure (2014)**

- **Greece**: 108 €
- **EU**: 102 €

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

**Real per capita expenditure growth rate (2005-2014)**

- **EU**: -0.04%
- **Greece**: -7.50%

**Regular consumers** by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Socio-professional category</th>
<th>Household composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>Self-employed</td>
<td>1</td>
</tr>
<tr>
<td>25-39</td>
<td>Managers</td>
<td>74%</td>
</tr>
<tr>
<td>40-54</td>
<td>Other white collars</td>
<td>81%</td>
</tr>
<tr>
<td>55+</td>
<td>Manual workers</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>House persons</td>
<td>75%</td>
</tr>
<tr>
<td></td>
<td>Un-employed</td>
<td>70%</td>
</tr>
<tr>
<td></td>
<td>Retired</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>Students</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td><strong>Greece</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>EU</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Regular consumers are those who eat fishery and aquaculture products at least once a month**
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors

PERSONAL FACTORS

EXTERNAL FACTORS
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behaviour:
- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels
- Clarity of information
- Trust in information required by law
- Taste, smell or high prices
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

Information sources:
- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books, and magazines
- Store employee or fishmonger

Greece EU

Consumer interest in information on labels:
- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs

Clarity of information:
- Trust in information provided by seller
- Trust in information required by law

69% 69%
74% 71%
80% 81%

Factors in influencing consumer demand and purchasing behaviour:
- 73%
- 77%
- 55%
- 55%
- 7%
- 13%
- 81%
- 25%
- 58%
- 12%
- 20%
- 64%
- 14%
- 6%
- 17%
- 12%
- 24%
- 14%
- 213%
Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Hungary</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,6 kg per capita</td>
<td>25,5 kg per capita</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

<table>
<thead>
<tr>
<th>Hungary</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.88 %</td>
<td>-0.04 %</td>
</tr>
</tbody>
</table>

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Hungary</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 €</td>
<td>102 €</td>
</tr>
</tbody>
</table>

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
<th>Household composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>26 % 71 %</td>
<td>26 % 81 %</td>
<td>34 % 71 %</td>
<td>23 % 72 %</td>
<td>26 % 73 %</td>
<td>28 % 70 %</td>
<td>25 % 75 %</td>
<td>25 % 67 %</td>
<td>71 % 72 %</td>
</tr>
<tr>
<td>25-39</td>
<td>27 % 70 %</td>
<td>26 % 81 %</td>
<td>34 % 71 %</td>
<td>23 % 72 %</td>
<td>26 % 73 %</td>
<td>28 % 70 %</td>
<td>25 % 75 %</td>
<td>25 % 77 %</td>
<td>75 % 72 %</td>
</tr>
<tr>
<td>40-54</td>
<td>28 % 75 %</td>
<td>26 % 81 %</td>
<td>34 % 71 %</td>
<td>23 % 72 %</td>
<td>26 % 73 %</td>
<td>28 % 70 %</td>
<td>25 % 75 %</td>
<td>25 % 77 %</td>
<td>75 % 72 %</td>
</tr>
<tr>
<td>55+</td>
<td>26 % 77 %</td>
<td>26 % 81 %</td>
<td>34 % 71 %</td>
<td>23 % 72 %</td>
<td>26 % 73 %</td>
<td>28 % 70 %</td>
<td>25 % 75 %</td>
<td>25 % 67 %</td>
<td>71 % 72 %</td>
</tr>
</tbody>
</table>

\[ y = 101.88e^{0.001x} \]

Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

**Regular consumers vs non-consumers & Regular purchasers vs non-purchasers**

**Preference about types of products**

**Main products consumed**

**Freshwater carp**

**Prefering about**

**Main consumption/purchasing factors**

**Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)**
Purchasing factors and use of information

### Information sources

- **Public institutions**: Hungary 4%, EU 3%
- **NGOs**: Hungary 6%, EU 5%
- **Internet**: Hungary 20%, EU 24%
- **Friends and family**: Hungary 45%, EU 28%
- **Television, books and magazines**: Hungary 24%, EU 29%
- **Store employee or fishmonger**: Hungary 52%, EU 52%

### Consumer attitude to information on labels

- **Clarity of information**: Hungary 79%, EU 69%
- **Trust in information provided by seller**: Hungary 82%, EU 71%
- **Trust in information required by law**: Hungary 81%, EU 81%

### Consumer interest in information on labels

- **Fresh, frozen, smoked, dried products**
  - Product name and species name: 100%, EU 88%
  - "Use by" or "best before" date: 60%, EU 40%
  - Wild or farmed product: 20%, EU 0%
  - Whether previously frozen: 40%, EU 60%
  - Area of catch or production: 20%, EU 0%

- **Tinned or prepared products**
  - Species contained: 60%, EU 40%
  - Processing plant location: 40%, EU 60%

- **Voluntary information for all FAPs**
  - Date of catch or production: 60%, EU 40%
  - Fishing gear used: Hungary 79%, EU 69%
  - Information on the fisherman/fish farmer: 79%, EU 69%
  - Country of the ship that caught the product: 82%, EU 71
  - Environmental information: 71%, EU 70%
  - Social information: 71%, EU 69%
  - Ethical information: 81%, EU 81%
Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>56%</td>
<td>76%</td>
<td>66%</td>
<td>73%</td>
<td>75%</td>
<td>69%</td>
<td>74%</td>
<td>58%</td>
</tr>
<tr>
<td>25-39</td>
<td>53%</td>
<td>77%</td>
<td>66%</td>
<td>72%</td>
<td>73%</td>
<td>70%</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>40-54</td>
<td>2%</td>
<td>79%</td>
<td>73%</td>
<td>70%</td>
<td>75%</td>
<td>69%</td>
<td>74%</td>
<td>67%</td>
</tr>
<tr>
<td>55+</td>
<td>78%</td>
<td>78%</td>
<td>69%</td>
<td>75%</td>
<td>74%</td>
<td>74%</td>
<td>76%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

Regular consumers\(^{14}\) by socio-demographic group

Regular consumers are those who eat fishery and aquaculture products at least once a month
### Consumer habits

#### Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

![Diagram showing consumer habits]

#### Preference about types of products

![Preference about types of products diagram]

#### Main products consumed

<table>
<thead>
<tr>
<th></th>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cod</td>
<td>41%</td>
<td>6%</td>
</tr>
<tr>
<td>Prawns</td>
<td>6%</td>
<td>53%</td>
</tr>
<tr>
<td>Haddock</td>
<td>34%</td>
<td>8%</td>
</tr>
<tr>
<td>Hake</td>
<td>39%</td>
<td>7%</td>
</tr>
<tr>
<td>Salmon</td>
<td>40%</td>
<td>52%</td>
</tr>
</tbody>
</table>

#### Preference about

- **Fish farm, fisherman**: Ireland 7%, EU 9%
- **Grocery store, super / hyper market**: Ireland 76%, EU 74%
- **Fishmonger or specialist shop**: Ireland 37%, EU 40%
- **Market**: Ireland 15%, EU 25%

#### Types of FAPS: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th></th>
<th>Fresh</th>
<th>Frozen</th>
<th>Smoked</th>
<th>Tinned</th>
<th>Breaded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>56%</td>
<td>24%</td>
<td>13%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Never</td>
<td>11%</td>
<td>21%</td>
<td>14%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>Δ(MS-EU)</td>
<td>5%</td>
<td>1%</td>
<td>5%</td>
<td>0%</td>
<td>5%</td>
</tr>
</tbody>
</table>

#### Main consumption/purchasing factors

- **Fish as source of wellness and Hedonism**: Ireland 73%, EU 68%
- **Convenience and ease of preparation**: Ireland 54%, EU 55%
- **Propensity to try new products**: Ireland 74%, EU 60%
- **High prices**: Ireland 126%, EU 123%
- **Retail diversification**: Ireland 67%, EU 68%
- **Frequency of promotional events**: Ireland 74%, EU 62%
- **Product’s sustainability**: Ireland 16%, EU 15%

#### External factors

- **Ireland**: 73%
- **EU**: 68%
Purchasing factors and use of information

**Purchasing factors**
- **Price, price/quality ratio**
- **Appearance**
- **Origin (regional/national)**
- **Brand or quality labels**

**Information sources**
- **Public institutions**
- **NGOs**
- **Internet**
- **Friends and family**
- **Television, books and magazines**
- **Store employee or fishmonger**

**Consumer attitude to information on labels**
- **Clarity of information**
- **Trust in information provided by seller**
- **Trust in information required by law**

**Consumer interest in information on labels**
- **Fresh, frozen, smoked, dried products**
- **Tinned or prepared products**
- **Voluntary information for all FAPs**

**Main reasons for not purchasing fish**
- **Taste, smell or appearance**
- **High prices**
- **Health concerns**
- **No habit of buying fish**
- **Environmental concerns**
- **Vegetarian or vegan concerns**

**Information on the fisherman/fish farmer**
- **Date of catch or production**
- **Processing plant location**
- **Origin of processed product**
- **Fishing gear used**
- **Whether previously frozen**

**Environmental information**
- **Port in which the product was landed**

**Social information**
- **Country of the ship that caught the product**

**Ethical information**
- **Use by** or “best before” date
- **Species contained**
- **Origin of processed product**
- **Date of catch or production by**
- **Part in which the product was caught**
**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>28.9</td>
</tr>
<tr>
<td>EU</td>
<td>25.5</td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

- **Italy**: 1.27%
- **EU**: -0.04%

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Nominal expenditure (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>168 €</td>
</tr>
<tr>
<td>EU</td>
<td>102 €</td>
</tr>
</tbody>
</table>

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

- **y = 101.79e^{-0.007x}**

**Regular consumers**

**Age classes**

<table>
<thead>
<tr>
<th>Age Class</th>
<th>Regular Consumers</th>
<th>15-24</th>
<th>25-39</th>
<th>40-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>66% 67%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-39</td>
<td>73% 70%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-54</td>
<td>70% 70%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>65% 71%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Socio-professional category**

<table>
<thead>
<tr>
<th>Category</th>
<th>Italy</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>72%</td>
<td>76%</td>
</tr>
<tr>
<td>Managers</td>
<td>81%</td>
<td>88%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>71%</td>
<td>71%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td>House persons</td>
<td>74%</td>
<td>73%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>Retired</td>
<td>57%</td>
<td>76%</td>
</tr>
<tr>
<td>Students</td>
<td>63%</td>
<td>67%</td>
</tr>
</tbody>
</table>

**Household composition**

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Italy</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>61%</td>
<td>71%</td>
</tr>
<tr>
<td>2</td>
<td>66%</td>
<td>72%</td>
</tr>
<tr>
<td>3</td>
<td>74%</td>
<td>75%</td>
</tr>
<tr>
<td>4+</td>
<td>68%</td>
<td>72%</td>
</tr>
</tbody>
</table>

**Notes:**

15 Regular consumers are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Italy
38%
EU
33%
Wild fish
Farmed fish
No preference

Italy
58%
EU
4%
Marine fish
Freshwater fish
No preference

Italy
84%
EU
62%
Loose
Pre-packed

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/ purchasing factors

Italy
EU
68%
60%
68%
60%
82%
62%
26%
32%
67%
68%
68%
60%
120%
123%
10%
15%
12%
12%
Purchasing factors and use of information

### Purchasing Factors
- **Price, price/quality ratio**
- **Appearance**
- **Origin** (regional/national)
- **Brand or quality labels**

### Information Sources
- **Public institutions**
- **NGOs**
- **Internet**
- **Friends and family**
- **Television, books, and magazines**
- **Trust in information provided by seller**
- **Clarity of information**
- **Trust in information required by law**

### Consumer Attitude to Information on Labels
- **Clarity of information**
  - Italy: 62%
  - EU: 69%
- **Trust in information provided by seller**
  - Italy: 79%
  - EU: 71%
- **Trust in information required by law**
  - Italy: 85%
  - EU: 81%

### Consumer Interest in Information on Labels

#### Fresh, frozen, smoked, dried products
- **Product name and species name**
- **“Use by” or “Best before” date**
- **Wild or farmed product**
- **Whether previously frozen**
- **Area of catch or production**
- **Fishing gear used**

#### Tinned or prepared products
- **Species contained**
- **Processing plant location**
- **Origin of processed product**
- **Fishing gear used**
- **Wild or farmed product**

#### Voluntary Information for all FAPs
- **Information on the fisherman/fish farmer**
- **Date of catch or production**
- **Port in which the product was landed**
- **Environmental information**
- **Social information**
- **Ethical information**
- **Country of the ship that caught the product**

### Information on the fisherman/fish farmer
- **Date of catch or production**
- **Port in which the product was landed**
- **Environmental information**
- **Social information**
- **Ethical information**
- **Country of the ship that caught the product**
Consumption and expenditure

Per capita consumption (2014)

Latvia
25.5 kg/per capita

EU
25.5 kg/per capita

Real per capita expenditure growth rate (2005-2014)

Latvia
5.19%

EU
-0.04%

Per capita nominal expenditure (2014)

Latvia
61 €

EU
102 €

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

Age classes

15-24
64% (Latvia), 67% (EU)

25-39
75% (Latvia), 70% (EU)

40-54
82% (Latvia), 75% (EU)

55+
79% (Latvia), 77% (EU)

Socio-professional category

Self-employed
64% (Latvia), 76% (EU)

Managers
81% (Latvia), 81% (EU)

Other white collars
66% (Latvia), 71% (EU)

Manual workers
72% (Latvia), 79% (EU)

House persons
67% (Latvia), 73% (EU)

Un-employed
80% (Latvia), 78% (EU)

Retired
76% (Latvia), 76% (EU)

Students
63% (Latvia), 64% (EU)

Household composition

1
70% (Latvia), 71% (EU)

2
75% (Latvia), 79% (EU)

3
73% (Latvia), 75% (EU)

4+
72% (Latvia), 81% (EU)

16 Regular consumers are those who eat fishery and aquaculture products at least once a month
**Consumer habits**

**Regular consumers vs non-consumers & Regular purchasers vs non-purchasers**

- Regular consumers: Latvia: 60%, EU: 50%
- Non-consumers: Latvia: 40%, EU: 50%
- Regular purchasers: Latvia: 80%, EU: 70%
- Non-purchasers: Latvia: 20%, EU: 30%

**Main products consumed**

- Marine: herring, sprat, cod
- Freshwater: salmon, flounder, fraček

**Preference about types of products**

- Fresh: Latvia: 45%, EU: 30%
- Frozen: Latvia: 25%, EU: 30%
- Smoked, Salted, dried: Latvia: 10%, EU: 5%
- Preserved, processed, canned: Latvia: 10%, EU: 5%

**Main consumption/purchasing factors**

- Fish as source of wellness and health: Latvia: 78%, EU: 70%
- Hedonism: Latvia: 12%, EU: 10%
- Convenience and ease of preparation: Latvia: 20%, EU: 15%
- Propensity to try new products: Latvia: 60%, EU: 50%

**Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)**

- Fresh
  - Often: Latvia: 50%, EU: 40%
  - Delta (MS-EU): 10%
- Frozen
  - Never: Latvia: 20%, EU: 10%
  - Delta (MS-EU): -10%
- Smoked
  - Often: Latvia: 20%, EU: 10%
  - Delta (MS-EU): 10%
- Tinned
  - Often: Latvia: 40%, EU: 30%
  - Delta (MS-EU): 10%
- Breaded
  - Often: Latvia: 10%, EU: 5%
  - Delta (MS-EU): 5%
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behavior

1. Price, price/quality ratio
2. Appearance
3. Origin (regional/national)
4. Brand or quality labels

Information sources

- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Consumer interest in information on labels

- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs

Consumer attitude to information on labels

- Clarity of information
- Trust in information provided by seller
- Trust in information required by law

Information on the fisherman/fish farmer

- Species contained
- Origin of processed product
- Date of catch or production
- Port in which the product was landed
- Country of the ship that caught the product

Social and ethical information

- Information on the fisherman/fish farmer
- Environmental information
- Social information

50
LITHUANIA

Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>44.7 kg</td>
<td>25.5 kg</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

<table>
<thead>
<tr>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.23%</td>
<td>-0.04%</td>
</tr>
</tbody>
</table>

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>93 €</td>
<td>102 €</td>
</tr>
</tbody>
</table>

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>77%</td>
<td>67%</td>
</tr>
<tr>
<td>25-39</td>
<td>77%</td>
<td>70%</td>
</tr>
<tr>
<td>40-54</td>
<td>81%</td>
<td>75%</td>
</tr>
<tr>
<td>55+</td>
<td>81%</td>
<td>77%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socio-professional category</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>76%</td>
<td>88%</td>
</tr>
<tr>
<td>Managers</td>
<td>81%</td>
<td>83%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>71%</td>
<td>81%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>72%</td>
<td>83%</td>
</tr>
<tr>
<td>House persons</td>
<td>73%</td>
<td>88%</td>
</tr>
<tr>
<td>Un-employed</td>
<td>71%</td>
<td>78%</td>
</tr>
<tr>
<td>Retired</td>
<td>79%</td>
<td>76%</td>
</tr>
<tr>
<td>Students</td>
<td>71%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Household composition

<table>
<thead>
<tr>
<th>Household composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4+</td>
</tr>
</tbody>
</table>

Regular consumers are those who eat fishery and aquaculture products at least once a month

---

17 Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Lithuania

EU

<table>
<thead>
<tr>
<th>Production</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine Fish</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>No preference</td>
<td>62%</td>
<td>58%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Species</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine Fish</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>No preference</td>
<td>67%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Presentation</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loose</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Pre-packed</td>
<td>33%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th>Type</th>
<th>Often</th>
<th>Δ(MS-EU)</th>
<th>Never</th>
<th>Δ(MS-EU)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>20%</td>
<td>4%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Frozen</td>
<td>18%</td>
<td>2%</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Smoked</td>
<td>6%</td>
<td>-14%</td>
<td>7%</td>
<td>-14%</td>
</tr>
<tr>
<td>Tinned</td>
<td>4%</td>
<td>7%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Breaded</td>
<td>6%</td>
<td>14%</td>
<td>8%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Main consumption/purchasing factors

**PERSONAL FACTORS**

- Fish as source of wellness and health: 100% Lithania, 123% EU
- Hedonism: 80% Lithania, 68% EU
- Convenience and ease of preparation: 33% Lithania, 23% EU
- Propensity to try new products: 67% Lithania, 60% EU

**EXTERNAL FACTORS**

- High prices: 5% Lithania, 6% EU
- Retail diversification: 43% Lithania, 56% EU
- Frequency of promotional events: 57% Lithania, 60% EU
- Product's sustainability: 3% Lithania, 15% EU

Place of sale

<table>
<thead>
<tr>
<th>Place</th>
<th>Lithuania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish farm, fisherman</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Grocery store, super / hyper market</td>
<td>84%</td>
<td>74%</td>
</tr>
<tr>
<td>Fishmonger or specialist shop</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>Market</td>
<td>35%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Preference about

Types of products

Preserved, processed, canned

Smoked, Salted, dried

Fresh, Frozen, Smoked, Tinned, Breaded
Purchasing factors and use of information

Information sources

Consumer attitude to information on labels

Consumer interest in information on labels

Voluntary information for all FAPs

**Purchasing factors and use of information**

- **Price, price/quality ratio**
- **Appearance**
- **Brand or quality labels**

**Factors influencing consumer demand and purchasing behaviour**

- **Lithuania**
- **EU**

**Information sources**

- **Public institutions**
- **NGOs**
- **Internet**
- **Friends and family**
- **Television, books and magazines**
- **Store employee or fishmonger**

**Consumer attitude to information on labels**

- **Clarity of information**
- **Trust in information provided by seller**
- **Trust in information required by law**

**Consumer interest in information on labels**

- **Fresh, frozen, smoked, dried products**
- **Tinned or prepared products**
- **Voluntary information for all FAPs**

**Voluntary information for all FAPs**

- **Date of catch or production**
- **Processing plant location**
- **Origin of processed product**
- **Species contained**
- **Wild or farmed product**
- **Processing plant location**
- **Fishing gear used**
- **Wild or farmed product**
- **Fishing gear used**
- **Country of the ship that caught the product**
- **Information on the fisherman/fish farmer**

**Information sources**

- **Public institutions**
- **NGOs**
- **Internet**
- **Friends and family**
- **Television, books and magazines**
- **Store employee or fishmonger**

**Consumer attitude to information on labels**

- **Clarity of information**
- **Trust in information provided by seller**
- **Trust in information required by law**

**Consumer interest in information on labels**

- **Fresh, frozen, smoked, dried products**
- **Tinned or prepared products**
- **Voluntary information for all FAPs**
LUXEMBOURG

Consumption and expenditure

Per capita consumption (2014)

Luxembourg
33,1
kg/per capita

EU
25,5
kg/per capita

Real per capita expenditure growth rate (2005-2014)

Luxembourg
6,82%

Per capita nominal expenditure (2014)

Luxembourg
205 €

EU
102 €

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

y = 110,1e0,0041x

Regular consumers¹⁸ by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Socio-professional category</th>
<th>Household composition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Luxembourg</td>
<td>EU</td>
</tr>
<tr>
<td>15-24</td>
<td>Self-employed</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>75%</td>
</tr>
<tr>
<td></td>
<td>Other white collar</td>
<td>77%</td>
</tr>
<tr>
<td>25-39</td>
<td>Manual workers</td>
<td>78%</td>
</tr>
<tr>
<td></td>
<td>House persons</td>
<td>78%</td>
</tr>
<tr>
<td>40-54</td>
<td>Un-employed</td>
<td>76%</td>
</tr>
<tr>
<td></td>
<td>Retired</td>
<td>79%</td>
</tr>
<tr>
<td>55+</td>
<td>Students</td>
<td>66%</td>
</tr>
</tbody>
</table>

¹⁸ Regular consumers are those who eat fishery and aquaculture products at least once a month
Consumer habits

Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

Preference about types of products

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors

Preference about places of sale
Purchasing factors and use of information

**Main NON consuming factor / NON purchasing factors**

- Price, price/quality ratio: Luxembourg 38%, EU 51%
- Appearance: Luxembourg 72%, EU 58%
- Origin (regional/national): Luxembourg 66%, EU 42%
- Brand or quality labels: Luxembourg 22%, EU 24%

**Factors influencing consumer demand and purchasing behaviour**

- Taste, smell or appearance: Luxembourg 83%, EU 59%
- High prices: Luxembourg 13%, EU 32%
- Health concerns: Luxembourg 37%, EU 32%
- No habit of buying fish: Luxembourg 23%, EU 18%
- Environmental concerns: Luxembourg 15%, EU 12%
- Vegetarian or vegan: Luxembourg 7%, EU 13%

**Information sources**

- Public institutions: Luxembourg 5%, EU 4%
- NGOs: Luxembourg 23%, EU 5%
- Internet: Luxembourg 22%, EU 28%
- Friends and family: Luxembourg 24%, EU 23%
- Television, books and magazines: Luxembourg 37%, EU 29%
- Store employee or fishmonger: Luxembourg 53%, EU 52%

**Consumer attitude to information on labels**

- Clarity of information: Luxembourg 70%, EU 69%
- Trust in information provided by seller: Luxembourg 65%, EU 71%
- Trust in information required by law: Luxembourg 77%, EU 81%

**Consumer interest in information on labels**

- Fresh, frozen, smoked, dried products:
  - Product name and species name: Luxembourg 100%, EU 100%
  - Use by" or "best before" date: Luxembourg 40%, EU 40%
  - Wild or farmed product: Luxembourg 40%, EU 40%
  - Area of catch or production: Luxembourg 20%, EU 20%
  - Whether previously frozen: Luxembourg 0%, EU 0%
  - Fishing gear used: Luxembourg 6%, EU 24%

- Tinned or prepared products:
  - Species contained: Luxembourg 80%, EU 60%
  - Processing plant location: Luxembourg 60%, EU 40%
  - Origin of processed product: Luxembourg 40%, EU 21%
  - Fishing gear used: Luxembourg 17%, EU 14%
  - Wild or farmed product: Luxembourg 6%, EU 14%

- Voluntary information for all FAPs:
  - Date of catch or production: Luxembourg 80%, EU 60%
  - Information on the fisherman/fish farmer: Luxembourg 60%, EU 40%
  - Environmental information: Luxembourg 40%, EU 23%
  - Port in which the product was landed: Luxembourg 21%, EU 12%
  - Country of the ship that caught the product: Luxembourg 7%, EU 13%
  - Social information: Luxembourg 5%, EU 5%
  - Ethical information: Luxembourg 5%, EU 5%
Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>61%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-39</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-64</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>87%</td>
<td>81%</td>
<td>81%</td>
<td>78%</td>
<td>71%</td>
<td>62%</td>
<td>78%</td>
<td>58%</td>
</tr>
</tbody>
</table>

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>61%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-39</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-64</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>87%</td>
<td>81%</td>
<td>81%</td>
<td>78%</td>
<td>71%</td>
<td>62%</td>
<td>78%</td>
<td>58%</td>
</tr>
</tbody>
</table>

Regular consumers by socio-demographic group

Regular consumers are those who eat fishery and aquaculture products at least once a month.
### Consumer habits

#### Regular consumers vs non-consumers &
#### Regular purchasers vs non-purchasers

#### Preference about types of products

---

**Preference about**

<table>
<thead>
<tr>
<th>Production method</th>
<th>Malta</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh fish, fisherman</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Fish farm, fisherman</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Grocery store, super hyper market</td>
<td>40%</td>
<td>74%</td>
</tr>
<tr>
<td>Fishmonger or specialist shop</td>
<td>40%</td>
<td>74%</td>
</tr>
<tr>
<td>Market</td>
<td>15%</td>
<td>25%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Species habitat</th>
<th>Malta</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild fish</td>
<td>60%</td>
<td>34%</td>
</tr>
<tr>
<td>Farmed fish</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>No preference</td>
<td>33%</td>
<td>58%</td>
</tr>
<tr>
<td>Marine fish</td>
<td>70%</td>
<td>39%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>No preference</td>
<td>23%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Presentation</th>
<th>Malta</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loose</td>
<td>84%</td>
<td>69%</td>
</tr>
<tr>
<td>Pre-packed</td>
<td>68%</td>
<td>62%</td>
</tr>
</tbody>
</table>

### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th>Type of Fish</th>
<th>Often</th>
<th>(\Delta(MS-EU))</th>
<th>Never</th>
<th>(\Delta(MS-EU))</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild fish</td>
<td>48%</td>
<td>24%</td>
<td>-14%</td>
<td>15%</td>
</tr>
<tr>
<td>Farmed fish</td>
<td>50%</td>
<td>9%</td>
<td>-14%</td>
<td>15%</td>
</tr>
<tr>
<td>No preference</td>
<td>50%</td>
<td>9%</td>
<td>-14%</td>
<td>15%</td>
</tr>
</tbody>
</table>

---

### Main consumption/purchasing factors

**PERSONAL FACTORS**

- Fish as source of wellness and health: 133% (Malta) vs 133% (EU)
- Hedonism: 57% (Malta) vs 57% (EU)
- Convenience and ease of preparation: 68% (Malta) vs 68% (EU)
- Propensity to try new products: 23% (Malta) vs 23% (EU)

**EXTERNAL FACTORS**

- High prices: 75% (Malta) vs 68% (EU)
- Retail diversification: 68% (Malta) vs 51% (EU)
- Frequency of promotional events: 69% (Malta) vs 56% (EU)
- Product’s sustainability: 11% (Malta) vs 15% (EU)
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behaviour

- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Information sources

- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Consumer attitude to information on labels

- Clarity of information
  - Malta: 69%
  - EU: 69%

- Trust in information provided by seller
  - Malta: 77%
  - EU: 71%

- Trust in information required by law
  - Malta: 89%
  - EU: 81%

Consumer interest in information on labels

Fresh, frozen, smoked, dried products

- Product name and species name: 100%
- "use by" or "best before" date: 80%
- Wild or farmed product: 60%
- Area of catch or production: 40%
- Whether previously frozen: 20%

Tinned or prepared products

- Species contained: 70%
- Processing plant location: 60%
- Wild or farmed product: 50%
- Fishing gear used: 40%
- Whether previously frozen: 20%

Voluntary information for all FAPs

- Date of catch or production: 80%
- Port in which the product was landed: 60%
- Information on the fisherman/fish farmer: 50%
- Environmental information: 40%
- Social information: 30%
- Ethical information: 20%
Consumption and expenditure

Per capita consumption (2014)

- **Netherlands**: 22.6 kg/per capita
- **EU**: 25.5 kg/per capita

Per capita nominal expenditure (2014)

- **Netherlands**: 59 €
- **EU**: 102 €

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

y = 99,741e^{0.0071x}

Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>80%</td>
<td></td>
<td>75%</td>
<td>80%</td>
<td>71%</td>
<td>79%</td>
<td>74%</td>
<td>67%</td>
</tr>
<tr>
<td>25-39</td>
<td>81%</td>
<td></td>
<td>80%</td>
<td>81%</td>
<td>76%</td>
<td>81%</td>
<td>75%</td>
<td>77%</td>
</tr>
<tr>
<td>40-54</td>
<td>75%</td>
<td></td>
<td>78%</td>
<td>70%</td>
<td>73%</td>
<td>71%</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>55+</td>
<td>76%</td>
<td></td>
<td>75%</td>
<td>67%</td>
<td>72%</td>
<td>71%</td>
<td>77%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Socio-professional category

- **Self-employed**: 89%
- **Managers**: 81%
- **Other white collars**: 86%
- **Manual workers**: 72%
- **House persons**: 81%
- **Un-employed**: 74%
- **Retired**: 76%
- **Students**: 67%

Household composition

<table>
<thead>
<tr>
<th>1</th>
<th>71%</th>
<th>81%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>75%</td>
<td>84%</td>
</tr>
<tr>
<td>3</td>
<td>75%</td>
<td>82%</td>
</tr>
<tr>
<td>4+</td>
<td>72%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Regular consumers are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Freshwater
Tinned

pangasius
canned tuna

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/ purchasing factors

PERSONAL FACTORS

EXTERNAL FACTORS

Netherlands EU

Fresh Frozen Smoked Tinned Breaded

Fish farm, fisherman
Grocery store, super / hyper market
Fishmonger or specialist shop
Market

Frequency of promotional events
Product’s sustainability

Fish as source of wellness and health
Convenience and ease of preparation

61
Purchasing factors and use of information

### Main NON consumption / NON purchasing factors
- Taste, smell or appearance
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

### Consumer interest in information on labels

#### Fresh, frozen, smoked, dried products
- Product name and species name: 100%
- "Use by" or "Best before" date: 80%
- Whether previously frozen: 80%
- Wild or farmed product: 60%
- Area of catch or production: 50%

#### Tinned or prepared products
- Species contained: 100%
- Processing plant location: 80%
- Fishing gear used: 50%
- Wild or farmed product: 50%

#### Voluntary information for all FAPs
- Date of catch or production: 80%
- Environmental information: 70%
- Social information: 60%
- Ethical information: 50%

### Information sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Netherlands</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public institutions</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>NGOs</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Internet</td>
<td>24%</td>
<td>49%</td>
</tr>
<tr>
<td>Friends and family</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Television, books and magazines</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>Store employee or fishmonger</td>
<td>47%</td>
<td>52%</td>
</tr>
</tbody>
</table>

### Consumer attitude to information on labels

| Clarity of information | 76% | 69% |
| Trust in information provided by seller | 54% | 71% |
| Trust in information required by law | 77% | 81% |
**Consumption and expenditure**

**Per capita consumption (2014)**

- **Poland**: 13.0 kg/per capita
- **EU**: 25.5 kg/per capita

**Per capita nominal expenditure (2014)**

- **Poland**: 24 €
- **EU**: 102 €

**Real per capita expenditure growth rate (2005-2014)**

- **Poland**: 2.95%
- **EU**: -0.04%

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

**Regular consumers** by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>67%</td>
<td>71%</td>
<td>71%</td>
<td>72%</td>
<td>68%</td>
<td>59%</td>
<td>73%</td>
<td>72%</td>
</tr>
<tr>
<td>25-39</td>
<td>67%</td>
<td>71%</td>
<td>73%</td>
<td>72%</td>
<td>68%</td>
<td>59%</td>
<td>73%</td>
<td>72%</td>
</tr>
<tr>
<td>40-54</td>
<td>73%</td>
<td>75%</td>
<td>71%</td>
<td>72%</td>
<td>68%</td>
<td>70%</td>
<td>70%</td>
<td>72%</td>
</tr>
<tr>
<td>55+</td>
<td>73%</td>
<td>75%</td>
<td>71%</td>
<td>72%</td>
<td>68%</td>
<td>70%</td>
<td>70%</td>
<td>72%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

- **Self-employed**: 69%
- **Managers**: 73%
- **Other white collars**: 71%
- **Manual workers**: 72%
- **House persons**: 68%
- **Un-employed**: 59%
- **Retired**: 73%
- **Students**: 72%

**Household composition**

- **1**: 68% 68%
- **2**: 71% 24%
- **3**: 66% 75%
- **4+**: 72% 72%

---

*Regular consumers are those who eat fishery and aquaculture products at least once a month.*
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Marine | Freshwater

mackerel | tuna | Alaska pollack | salmon | trout | carp

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/ purchasing factors

PERSONAL FACTORS

EXTERNAL FACTORS

Poland | EU

Δ(MS-EU)
Purchasing factors and use of information

Information sources

Public institutions
NGOs
Internet
Friends and family
Television, books and magazines
Store employee or fishmonger

Clarity of information
Trust in information provided by seller
Trust in information required by law

Consumer attitude to information on labels

Consumer interest in information on labels

Fresh, frozen, smoked, dried products
Tinned or prepared products
Voluntary information for all FAPs

Purchasing factors and use of information

Price, price/quality ratio
Appearance
Origin (regional/national)
Brand or quality labels

Information sources

Taste, smell or high prices
Health concerns
No habit of buying fish
Environmental concerns
Vegetarian or animal product concerns

Consumer interest in information on labels

Voluntary information for all FAPs

Date of catch or production
Port in which the product was landed
Country of the ship that caught the product
Environmental information
Social information
Ethical information
**PORTUGAL**

### Consumption and expenditure

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Per capita consumption (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portugal</td>
<td>55.3 kg/per capita</td>
</tr>
<tr>
<td>EU</td>
<td>25.5 kg/per capita</td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

- Portugal: 1.50%
- EU: -0.04%

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Nominal expenditure (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portugal</td>
<td>300 €</td>
</tr>
<tr>
<td>EU</td>
<td>102 €</td>
</tr>
</tbody>
</table>

### Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

**Regular consumers**22 by socio-demographic group

- **Age classes**
  - 15-24: 67% (Portugal), 74% (EU)
  - 25-39: 72% (Portugal), 73% (EU)
  - 40-54: 73% (Portugal), 75% (EU)
  - 55+: 77% (Portugal), 77% (EU)

- **Socio-professional category**
  - Self-employed: 70% (Portugal), 87% (EU)
  - Managers: 74% (Portugal), 81% (EU)
  - Other white collars: 74% (Portugal), 83% (EU)
  - Manual workers: 68% (Portugal), 72% (EU)
  - House persons: 64% (Portugal), 73% (EU)
  - Un-employed: 70% (Portugal), 70% (EU)
  - Retired: 70% (Portugal), 70% (EU)
  - Students: 67% (Portugal), 70% (EU)

- **Household composition**
  - 1: 71% (Portugal), 70% (EU)
  - 2: 71% (Portugal), 70% (EU)
  - 3: 71% (Portugal), 70% (EU)
  - 4+: 71% (Portugal), 70% (EU)

---

22 Regular consumers are those who eat fishery and aquaculture products at least once a month
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

<table>
<thead>
<tr>
<th>Marine</th>
<th>Smoked, salted, dried fish</th>
<th>Tinned</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horse mackerel</td>
<td>Sardine</td>
<td>Salted and dried cod</td>
<td>Salmon</td>
</tr>
<tr>
<td>Gilthead seabream</td>
<td>Hake</td>
<td>Sardines</td>
<td></td>
</tr>
</tbody>
</table>

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Main consumption/purchasing factors

<table>
<thead>
<tr>
<th>PERSONAL FACTORS</th>
<th>EXTERNAL FACTORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish as source of wellness and health</td>
<td>High prices</td>
</tr>
<tr>
<td>Hedonism</td>
<td>Retail diversification</td>
</tr>
<tr>
<td>Convenience and ease of preparation</td>
<td>Frequency of promotional events</td>
</tr>
<tr>
<td>Propensity to try new products</td>
<td>Product's sustainability</td>
</tr>
</tbody>
</table>

67
Purchasing factors and use of information

**Factors influencing consumer demand and purchasing behavior**

- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

**Information sources**

- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books, and magazines
- Store employee or fishmonger

**Consumer attitude to information on labels**

- Clarity of information
- Trust in information provided by seller
- Trust in information required by law

**Consumer interest in information on labels**

- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs

**Main NDN consumption/ NON purchasing factors**

- Taste, smell, or appearance
- High prices
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

**Main NDN consumption/ NON purchasing factors**

- Portugal
- EU

**Main NDN consumption/ NON purchasing factors**

- Portugal
- EU

---

**Consumption/non-purchasing factors**

- Factors in influencing consumer demand and purchasing behavior

**Factors in influencing consumer demand and purchasing behavior**

- Portugal
- EU

---

**Consumption/non-purchasing factors**

- Information on labels

**Information on labels**

- Product name and species name
- "Use by" or "best before" date
- Wild or farmed product
- Processing plant location
- Area of catch or production
- Whether previously frozen
- Fishing gear used
- Species contained
- Origin of processed product
- Date of catch or production
- Information on the fisherman/fish farmer
- Environmental information
- Social information
- Ethical information

**Port in which the product was landed**

**Country of the ship that caught the product**

**Environmental information**

**Social information**

**Ethical information**

---

**68**
**ROMANIA**

### Consumption and expenditure

#### Per capita consumption (2014)
- **Romania**: 6.3 kg/per capita
- **EU**: 25.5 kg/per capita

#### Per capita nominal expenditure (2014)
- **Romania**: 87 €
- **EU**: 102 €

#### Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Romania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>59%</td>
<td>67%</td>
</tr>
<tr>
<td>25-39</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>40-54</td>
<td>69%</td>
<td>75%</td>
</tr>
<tr>
<td>55+</td>
<td>60%</td>
<td>77%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socio-professional category</th>
<th>Romania</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>70%</td>
<td>76%</td>
</tr>
<tr>
<td>Managers</td>
<td>68%</td>
<td>81%</td>
</tr>
<tr>
<td>Other white collars</td>
<td>88%</td>
<td>71%</td>
</tr>
<tr>
<td>Manual workers</td>
<td>6.7%</td>
<td>72%</td>
</tr>
<tr>
<td>House persons</td>
<td>5.8%</td>
<td>73%</td>
</tr>
<tr>
<td>Un-employed</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>Retired</td>
<td>59%</td>
<td>76%</td>
</tr>
<tr>
<td>Students</td>
<td>88%</td>
<td>6.7%</td>
</tr>
</tbody>
</table>

#### Household composition

| 1 | 54% | 71% |
| 2 | 64% | 75% |
| 3 | 61% | 75% |
| 4+| 69% | 72% |

---

**23 Regular consumers are those who eat fishery and aquaculture products at least once a month**
**Consumer habits**

**Regular consumers vs non-consumers & Regular purchasers vs non-purchasers**

**Main products consumed**
- Marine: mackerel
- Freshwater: carp

**Preference about**

**Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)**

**Main consumption/purchasing factors**
- Fish as source of wellness and health
- Hedonism
- Convenience and ease of preparation
- Propensity to try new products

---

**Other factors**
- PERSONAL FACTORS
- EXTERNAL FACTORS
- High prices
- Retail diversification
- Frequency of promotional events
- Product's sustainability
Purchasing factors and use of information

Information sources

- Public institutions: 4% (Romania), 4% (EU)
- NGOs: 5% (Romania), 5% (EU)
- Internet: 24% (Romania), 14% (EU)
- Friends and family: 52% (Romania), 52% (EU)
- Television, books, and magazines: 29% (Romania), 32% (EU)
- Store employee or fishmonger: 50% (Romania), 50% (EU)

Consumer attitude to information on labels

- Clarity of information: 69% (Romania), 61% (EU)
- Trust in information provided by seller: 71% (Romania), 60% (EU)
- Trust in information required by law: 81% (Romania), 72% (EU)

Consumer interest in information on labels

Fresh, frozen, smoked, dried products

- Product name and species name: 100% (Romania), 80% (EU)
- "Use by" or "best before" date: 80% (Romania), 60% (EU)
- Wild or farmed product: 60% (Romania), 40% (EU)
- Area of catch or production: 40% (Romania), 30% (EU)
- Whether previously frozen: 20% (Romania), 0% (EU)
- Fishing gear used: 0% (Romania), 10% (EU)

Tinned or prepared products

- Species contained: 70% (Romania), 80% (EU)
- Origin of processed product: 50% (Romania), 40% (EU)
- Processing plant location: 60% (Romania), 50% (EU)
- Wild or farmed product: 40% (Romania), 30% (EU)
- Fishing gear used: 30% (Romania), 20% (EU)

Voluntary information for all FAPs

- Date of catch or production: 80% (Romania), 80% (EU)
- Port in which the product was landed: 60% (Romania), 50% (EU)
- Information on the fisherman/fish farmer: 40% (Romania), 30% (EU)
- Country of the ship that caught the product: 30% (Romania), 20% (EU)
- Environmental information: 20% (Romania), 10% (EU)
- Social information: 10% (Romania), 0% (EU)
- Ethical information: 0% (Romania), 10% (EU)
Consumption and expenditure

Per capita consumption (2014)

**Slovakia**
7,8 kg/per capita

**EU**
25,5 kg/per capita

Per capita nominal expenditure (2014)

**Slovakia**
48 €

**EU**
102 €

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

Regular consumers by socio-demographic group

**Age classes**
- 15-24: 55% Slovakia, 67% EU
- 25-39: 45% Slovakia, 70% EU
- 40-54: 54% Slovakia, 75% EU
- 55+: 51% Slovakia, 77% EU

**Socio-professional category**
- Self-employed: 69% Slovakia, 70% EU
- Managers: 67% Slovakia, 81% EU
- Other white collars: 59% Slovakia, 72% EU
- Manual workers: 80% Slovakia, 72% EU
- House persons: 70% Slovakia, 72% EU
- Un-employed: 41% Slovakia, 70% EU
- Retired: 52% Slovakia, 74% EU
- Students: 14% Slovakia, 67% EU

Household composition
- 1: 44% Slovakia, 73% EU
- 2: 53% Slovakia, 73% EU
- 3: 58% Slovakia, 73% EU
- 4+: 52% Slovakia, 72% EU

---

Regular consumers are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Preference about

Types of FAPs: frequently vs never purchased (% of buyers by
MS and difference between % MS and % EU average)

Main consumption/ purchasing factors

PERSONAL FACTORS

EXTERNAL FACTORS

Slovakia

EU

Fish as source of wellness and health
Hedonism
Convenience and ease of preparation
Propensity to try new products

High prices
Retail diversification
Frequency of promotional events
Product's sustainability

Slovakia

EU

EU

EU
Purchasing factors and use of information

### Consumer interest in information on labels

**Fresh, frozen, smoked, dried products**
- Product name and species name: 100%
- "Use by" or "best before" date: 80%
- Wild or farmed product: 40%
- Whether previously frozen: 20%
- Area of catch or production: 10%
- Fishing gear used: 10%

**Tinned or prepared products**
- Species contained: 70%
- Origin of processed product: 60%
- Fishing gear used: 60%
- Wild or farmed product: 40%
- Processing plant location: 20%
- Date of catch or production: 10%

**Voluntary information for all FAPs**
- Information on the fisherman/fish farmer: 80%
- Country of the ship that caught the product: 80%
- Environmental information: 80%
- Social information: 80%
- Ethical information: 80%
- Date of catch or production: 80%
- Port in which the product was landed: 60%
**SLOVENIA**

### Consumption and expenditure

#### Per capita consumption (2014)

- **Slovenia**: 10.8 kg/per capita
- **EU**: 25.5 kg/per capita

#### Per capita nominal expenditure (2014)

- **Slovenia**: 37 €
- **EU**: 102 €

#### Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

![Graph showing consumption and expenditure trends](image)

#### Regular consumers by socio-demographic group

- **Age classes**
  - 15-24: 69%
  - 25-39: 77%
  - 40-54: 89%
  - 55+: 87%

- **Socio-professional category**
  - Self-employed: 75%
  - Managers: 83%
  - Other white collars: 79%
  - Manual workers: 87%
  - House persons: 79%
  - Un-employed: 86%
  - Retired: 76%
  - Students: 69%

- **Household composition**
  - 1: 67%
  - 2: 79%
  - 3: 79%
  - 4+: 79%

---

25 Regular consumers are those who eat fishery and aquaculture products at least once a month
**Consumer habits**

**Regular consumers vs non-consumers & Regular purchasers vs non-purchasers**

**Preference about types of products**

**Preference about**

**Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)**

**Main consumption/ purchasing factors**

**PERSONAL FACTORS**

**EXTERNAL FACTORS**
Purchasing factors and use of information

**Information sources**
- Public institutions: Slovenia 3%, EU 4%
- NGOs: Slovenia 5%, EU 5%
- Internet: Slovenia 31%, EU 24%
- Friends and family: Slovenia 28%, EU 29%
- Television, books and magazines: Slovenia 50%, EU 52%
- Store employee or fishmonger: Slovenia 74%, EU 69%

**Consumer attitude to information on labels**
- Clarity of information: Slovenia 74%, EU 69%
- Trust in information provided by seller: Slovenia 63%, EU 71%
- Trust in information required by law: Slovenia 71%, EU 81%

**Consumer interest in information on labels**
- Fresh, frozen, smoked, dried products:
  - Species contained: Slovenia 80%, EU 80%
  - Wild or farmed product: Slovenia 60%, EU 60%
  - Whether previously frozen: Slovenia 40%, EU 40%
  - Use by or “best before” date: Slovenia 20%, EU 20%
- Tinned or prepared products:
  - Species contained: Slovenia 80%, EU 80%
  - Origin of processed product: Slovenia 50%, EU 50%
- Voluntary information for all FAPs:
  - Date of catch or production: Slovenia 50%, EU 50%
  - Port in which the product was landed: Slovenia 31%, EU 31%
  - Country of the ship that caught the product: Slovenia 24%, EU 24%
  - Information on the fisherman/fish farmer: Slovenia 16%, EU 16%
  - Environmental information: Slovenia 5%, EU 5%
  - Social information: Slovenia 5%, EU 5%
  - Ethical information: Slovenia 3%, EU 3%

**Main NON consumption/non purchasing factors**
- Taste, smell or appearance: Slovenia 26%, EU 55%
- High prices: Slovenia 55%, EU 22%
- Health concerns: Slovenia 13%, EU 9%
- No habit of buying fish: Slovenia 5%, EU 6%
- Environmental concerns: Slovenia 5%, EU 9%
- Vegetarian or vegan: Slovenia 3%, EU 4%
**Consumption and expenditure**

**Per capita consumption (2014)**

<table>
<thead>
<tr>
<th></th>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>kg/per capita</td>
<td>46.2</td>
<td>25.3</td>
</tr>
</tbody>
</table>

**Per capita nominal expenditure (2014)**

<table>
<thead>
<tr>
<th></th>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>€</td>
<td>210</td>
<td>102</td>
</tr>
</tbody>
</table>

**Real per capita expenditure growth rate (2005-2014)**

EU: -0.04%

Spain: -2.20%

**Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)**

\[ y = 101.93e^{-0.006x} \]

**Regular consumers**

Regular consumers are those who eat fishery and aquaculture products at least once a month.

**Socio-professional category**

- Self-employed: 78% (Spain), 75% (EU)
- Managers: 81% (Spain), 85% (EU)
- Other white collars: 72% (Spain), 81% (EU)
- Manual workers: 73% (Spain), 72% (EU)
- House persons: 77% (Spain), 77% (EU)
- Un-employed: 70% (Spain), 70% (EU)
- Retired: 67% (Spain), 87% (EU)
- Students: 67% (Spain), 87% (EU)

**Household composition**

<table>
<thead>
<tr>
<th>Number of people</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>71%</td>
<td>77%</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>EU</td>
<td>90%</td>
<td>94%</td>
<td>94%</td>
<td>92%</td>
</tr>
</tbody>
</table>

**Age classes**

- 15-24: 67% (Spain), 86% (EU)
- 25-39: 70% (Spain), 91% (EU)
- 40-54: 75% (Spain), 94% (EU)
- 55+: 77% (Spain), 95% (EU)
### Consumer habits

#### Regular consumers vs non-consumers & Regular purchasers vs non-purchasers

![Graph showing consumer habits comparison](image)

#### Preference about types of products

![Graph showing preference about types of products](image)

#### Main products consumed

<table>
<thead>
<tr>
<th>Marine</th>
<th>Freshwater</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hake</td>
<td>Salmon</td>
</tr>
<tr>
<td>Octopus</td>
<td></td>
</tr>
<tr>
<td>Shrimp</td>
<td></td>
</tr>
<tr>
<td>Squid</td>
<td></td>
</tr>
</tbody>
</table>

#### Preference about production method

<table>
<thead>
<tr>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild fish</td>
<td>41%</td>
</tr>
<tr>
<td>Farmed fish</td>
<td>5%</td>
</tr>
<tr>
<td>No preference</td>
<td>54%</td>
</tr>
</tbody>
</table>

#### Preference about species habits

<table>
<thead>
<tr>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine fish</td>
<td>59%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>1%</td>
</tr>
<tr>
<td>No preference</td>
<td>40%</td>
</tr>
</tbody>
</table>

#### Preference about presentation

<table>
<thead>
<tr>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loose</td>
<td>56%</td>
</tr>
<tr>
<td>Pre-packed</td>
<td>92%</td>
</tr>
</tbody>
</table>

#### Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

<table>
<thead>
<tr>
<th>Often</th>
<th>Δ(MS-EU)</th>
<th>Never</th>
<th>Δ(MS-EU)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>40%</td>
<td>Frozen</td>
<td>31%</td>
</tr>
<tr>
<td>Smoked</td>
<td>41%</td>
<td>Tinned</td>
<td>32%</td>
</tr>
<tr>
<td>Tinned</td>
<td>20%</td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td>Breaded</td>
<td></td>
<td></td>
<td>-4%</td>
</tr>
</tbody>
</table>

#### Main consumption/ purchasing factors

<table>
<thead>
<tr>
<th>PERSONAL FACTORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hedonism</td>
</tr>
<tr>
<td>Convenience and ease of preparation</td>
</tr>
<tr>
<td>Propensity to try new products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXTERNAL FACTORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>High prices</td>
</tr>
<tr>
<td>Retail diversification</td>
</tr>
<tr>
<td>Frequency of promotional events</td>
</tr>
<tr>
<td>Product's sustainability</td>
</tr>
</tbody>
</table>

#### Place of sale

<table>
<thead>
<tr>
<th>Fish, fisherman</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grocery store, super / hyper market</th>
</tr>
</thead>
<tbody>
<tr>
<td>66%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fishmonger or specialist shop</th>
</tr>
</thead>
<tbody>
<tr>
<td>52%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Spain</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>25%</td>
<td></td>
</tr>
</tbody>
</table>

#### Spain vs EU

<table>
<thead>
<tr>
<th>Wild fish</th>
<th>Farmed fish</th>
<th>No preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>92%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marine fish</th>
<th>Freshwater fish</th>
<th>No preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>2%</td>
<td>4%</td>
<td>-10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Loose</th>
<th>Pre-packed</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fresh</th>
<th>Frozen</th>
<th>Smoked</th>
<th>Tinned</th>
<th>Breaded</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>50%</td>
<td>40%</td>
<td>31%</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Often</th>
<th>Δ(MS-EU)</th>
<th>Never</th>
<th>Δ(MS-EU)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td></td>
<td>Frozen</td>
<td></td>
</tr>
<tr>
<td>Smoked</td>
<td></td>
<td>Tinned</td>
<td></td>
</tr>
<tr>
<td>Tinned</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breaded</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Purchasing factors and use of information

Main NON consumption/ NON purchasing factors

- Taste, smell or appearance
- High prices
- Health concerns
- No habit of buying fish
- Environmental concerns
- Vegetarian or vegan

Factors influencing consumer demand and purchasing behaviour

- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Information sources

- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Consumer attitude to information on labels

- Clarity of information
- Trust in information provided by seller
- Trust in information required by law

Consumer interest in information on labels

- Fresh, frozen, smoked, dried products
- Tinned or prepared products
- Voluntary information for all FAPs
Consumption and expenditure

Per capita consumption (2014)

<table>
<thead>
<tr>
<th>Country</th>
<th>Per capita consumption (kg per capita)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>33.2</td>
</tr>
<tr>
<td>EU</td>
<td>25.5</td>
</tr>
</tbody>
</table>

Real per capita expenditure growth rate (2005-2014)

Per capita expenditure growth rate (2005-2014) in Sweden: 3.37%.

Per capita nominal expenditure (2014)

<table>
<thead>
<tr>
<th>Country</th>
<th>Per capita nominal expenditure (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>143 €</td>
</tr>
<tr>
<td>EU</td>
<td>102 €</td>
</tr>
</tbody>
</table>

Per capita consumption (kg) and per capita real expenditure (PPPs) trends (Index 2005 =100)

Regular consumers by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>82 %</td>
<td>95 %</td>
<td>93 %</td>
<td>91 %</td>
<td>100 %</td>
<td>94 %</td>
<td>76 %</td>
<td>67 %</td>
</tr>
<tr>
<td>25-39</td>
<td>87 %</td>
<td>95 %</td>
<td>91 %</td>
<td>92 %</td>
<td>100 %</td>
<td>94 %</td>
<td>76 %</td>
<td>67 %</td>
</tr>
<tr>
<td>40-54</td>
<td>91 %</td>
<td>95 %</td>
<td>93 %</td>
<td>92 %</td>
<td>100 %</td>
<td>94 %</td>
<td>76 %</td>
<td>67 %</td>
</tr>
<tr>
<td>55 +</td>
<td>95 %</td>
<td>95 %</td>
<td>93 %</td>
<td>92 %</td>
<td>100 %</td>
<td>94 %</td>
<td>76 %</td>
<td>67 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socio-professional category</th>
<th>Sweden</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>76 %</td>
<td>92 %</td>
</tr>
<tr>
<td>Managers</td>
<td>95 %</td>
<td>93 %</td>
</tr>
<tr>
<td>Other white collars</td>
<td>91 %</td>
<td>92 %</td>
</tr>
<tr>
<td>Manual workers</td>
<td>93 %</td>
<td>92 %</td>
</tr>
<tr>
<td>House persons</td>
<td>100 %</td>
<td>94 %</td>
</tr>
<tr>
<td>Un-employed</td>
<td>73 %</td>
<td>90 %</td>
</tr>
<tr>
<td>Retired</td>
<td>76 %</td>
<td>94 %</td>
</tr>
<tr>
<td>Students</td>
<td>70 %</td>
<td>67 %</td>
</tr>
</tbody>
</table>

Household composition

- **1**
  - 74 % (Sweden), 77 % (EU)
  - 89 %
- **2**
  - 77 % (Sweden), 75 % (EU)
  - 92 %
- **3**
  - 75 % (Sweden), 75 % (EU)
  - 83 %
- **4+**
  - 72 % (Sweden), 94 % (EU)

Regular consumers are those who eat fishery and aquaculture products at least once a month.
**Consumer habits**

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

- **Marine**
  - herring
  - cod

Preference about consumption/purchasing factors

- **Personal factors**
  - Fish as source of wellness and health
  - Hedonism
  - Convenience and ease of preparation
  - Propensity to try new products

- **External factors**
  - High prices
  - Retail diversification
  - Frequency of promotional events
  - Product’s sustainability

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

Sweden: 35 % 6 % 59 %
EU: 34 % 8 % 58 %

Sweden: 34 % 3 % 63 %
EU: 39 % 7 % 54 %

Sweden: 36 % 84 %
EU: 68 % 62 %

Sweden: 26 % 48 %
EU: 8 % 9 %

Sweden: 12 %
EU: 9 %

Sweden: 102 %
EU: 88 %

Sweden: 51 %
EU: 68 %

Sweden: 46 %
EU: 56 %

Sweden: 47 %
EU: 15 %
Purchasing factors and use of information

### Information sources

- **Public institutions**: 8% Sweden, 9% EU
- **NGOs**: 6% Sweden, 9% EU
- **Internet**: 59% Sweden, 57% EU
- **Friends and family**: 29% Sweden, 28% EU
- **Television, books and magazines**: 49% Sweden, 47% EU
- **Store employee or fishmonger**: 47% Sweden, 52% EU

### Consumer attitude to information on labels

#### Clarity of information
- 78% Sweden, EU

#### Trust in information provided by seller
- 69% Sweden, EU

#### Trust in information required by law
- 87% Sweden
- 81% EU

### Consumer interest in information on labels

**Fresh, frozen, smoked, dried products**
- Product name and species name: 100% Sweden, 90% EU
- "Use by" or "best before" date: 40% Sweden, 30% EU
- Wild or farmed product: 30% Sweden, 20% EU
- Area of catch or production: 0% Sweden, 0% EU
- Whether previously frozen: 0% Sweden, 0% EU

**Tinned or prepared products**
- Species contained: 100% Sweden, EU
- Processing plant location: 80% Sweden, 70% EU
- Origin of processed product: 80% Sweden, 70% EU

**Voluntary information for all FAPs**
- Date of catch or production: 100% Sweden, 90% EU
- Information on the fisherman/fish farmer: 80% Sweden, 70% EU
- Port in which the product was landed: 80% Sweden, 70% EU
- Country of the ship that caught the product: 70% Sweden, 60% EU
- Social information: 60% Sweden, 50% EU
- Environmental information: 50% Sweden, 40% EU
- Ethical information: 40% Sweden, 30% EU
**UNITED KINGDOM**

**Consumption and expenditure**

**Per capita consumption (2014)**

United Kingdom: 24.9 kg/per capita  
EU: 25.5 kg/per capita

**Per capita nominal expenditure (2014)**

United Kingdom: 70 €  
EU: 102 €

**Regular consumers** by socio-demographic group

<table>
<thead>
<tr>
<th>Age classes</th>
<th>Self-employed</th>
<th>Managers</th>
<th>Other white collars</th>
<th>Manual workers</th>
<th>House persons</th>
<th>Un-employed</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>72%</td>
<td>75%</td>
<td>72%</td>
<td>72%</td>
<td>65%</td>
<td>63%</td>
<td>61%</td>
<td>65%</td>
</tr>
<tr>
<td>25-39</td>
<td>72%</td>
<td>75%</td>
<td>70%</td>
<td>79%</td>
<td>65%</td>
<td>70%</td>
<td>70%</td>
<td>67%</td>
</tr>
<tr>
<td>40-54</td>
<td>70%</td>
<td>73%</td>
<td>72%</td>
<td>75%</td>
<td>68%</td>
<td>70%</td>
<td>70%</td>
<td>70%</td>
</tr>
<tr>
<td>55+</td>
<td>86%</td>
<td>70%</td>
<td>72%</td>
<td>76%</td>
<td>65%</td>
<td>70%</td>
<td>70%</td>
<td>70%</td>
</tr>
</tbody>
</table>

**Socio-professional category**

- Self-employed: 72%
- Managers: 75%
- Other white collars: 72%
- Manual workers: 79%
- House persons: 65%
- Un-employed: 63%
- Retired: 61%
- Students: 65%

**Household composition**

1. 71%
2. 75%
3. 75%
4+. 73%

**Regular consumers** are those who eat fishery and aquaculture products at least once a month.
Consumer habits

Regular consumers vs non-consumers &
Regular purchasers vs non-purchasers

Preference about types of products

Main products consumed

Marine | Freshwater
---|---
**cod** | **salmon**

Preference about

- Place of sale
  - Fish farm, fisherman
  - Grocery store, super / hyper market
  - Fishmonger or specialist shop
  - Market

- Presentation
  - UK
  - EU

Types of FAPs: frequently vs never purchased (% of buyers by MS and difference between % MS and % EU average)

- MS
- EU

Main consumption/ purchasing factors

- Personal factors
  - Fish as source of wellness and health
  - Hedonism
  - Convenience and ease of preparation
  - Propensity to try new products

- External factors
  - High prices
  - Retail diversification
  - Frequency of promotional events
  - Product's sustainability
Purchasing factors and use of information

Factors influencing consumer demand and purchasing behaviour:
- Price, price/quality ratio
- Appearance
- Origin (regional/national)
- Brand or quality labels

Information sources:
- Public institutions
- NGOs
- Internet
- Friends and family
- Television, books and magazines
- Store employee or fishmonger

Trust in information provided by seller:
- United Kingdom: 81%
- EU: 71%

Trust in information required by law:
- United Kingdom: 89%
- EU: 81%

Consumer interest in information on labels:
- Fresh, frozen, smoked, dried products
  - Product name and species name
  - "use by" or "best before" date
  - Wild or farmed product
  - Whether previously frozen
  - Area of catch or production
  - Fishing gear used

Tinned or prepared products
- Species contained
- Origin of processed product
- Processing plant location
- Fishing gear used
- Wild or farmed product

Voluntary information for all FAPs
- Date of catch or production
- Country of the ship that caught the product
- Environmental information
- Social information
- Ethical information

Consumer attitude to information on labels:
- Clarity of information
  - United Kingdom: 83%
  - EU: 69%

- Trust in information provided by seller
  - United Kingdom: 81%
  - EU: 71%

- Trust in information required by law
  - United Kingdom: 89%
  - EU: 81%

Editor: European Commission, Directorate-General for Maritime Affairs and Fisheries, Director-General. Disclaimer: Although the Maritime Affairs and Fisheries Directorate General is responsible for the overall production of this publication, the views and conclusions presented in this report reflect the opinion of the author(s) and do not necessarily reflect the opinion of the Commission or its officers.

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